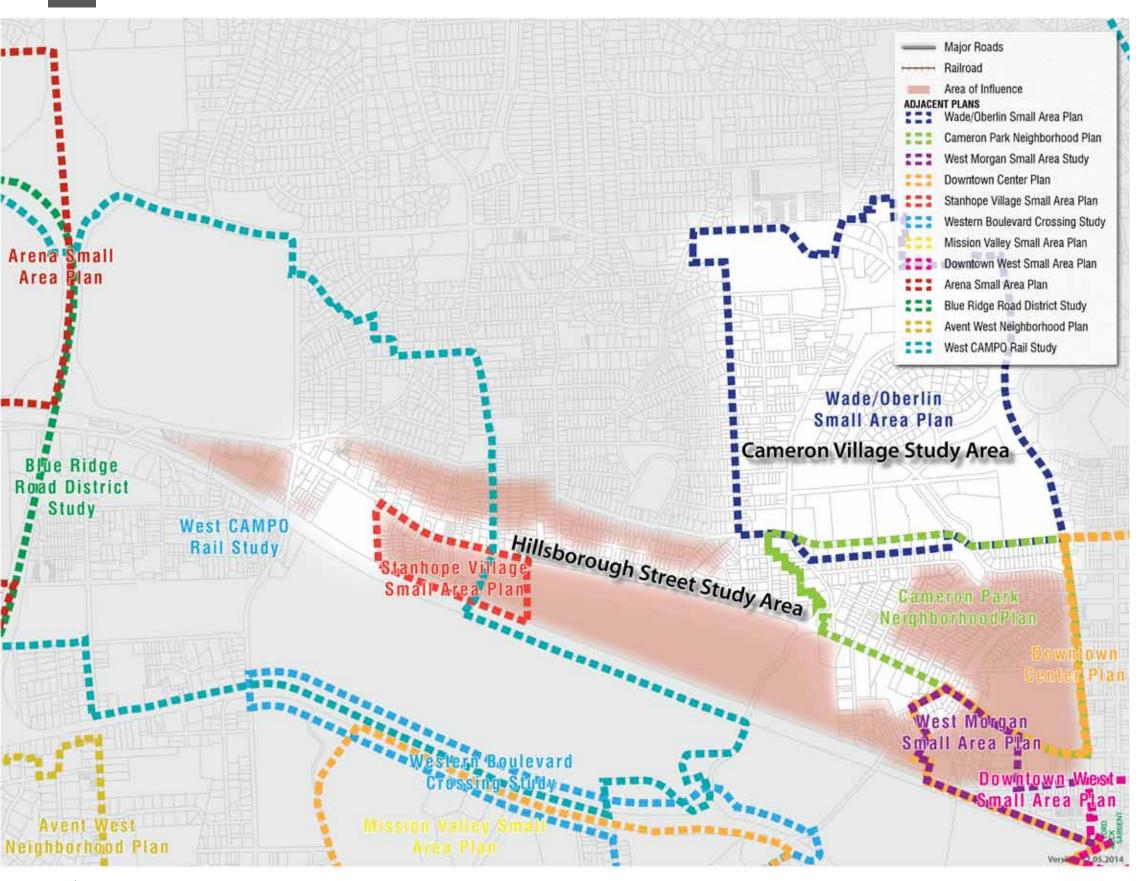






Study Area Context



STUDY AREAS

There are two study areas that make up the Small Area Plans being studied in this report — Cameron Village and Hillsborough Street. They are both described in more detail on the following two pages.

AREAS OF **I**NFLUENCE

It would be impossible to make a full evaluation of the study areas without also looking to the areas adjacent, known as the "areas of Influence" (shown in salmon in the map to the left) These Areas of Influence are generally bounded by, but may not be limited to areas:

- North to Clark Avenue
- East to St. Mary Street
- North Carolina State University North Campus
- West to Meredith College

ADJACENT PLANS

The Cameron Village study area was selected to replace the Wade/Oberlin Small Area Plan the is currently included in the Comprehensive Plan. The Hillsborough Street study area was selected to replace the 1999 New Vision for Hillsborough Street and provide current planning for areas of the Hillsborough Street Business Improvement District not addressed by other planning efforts. The two study areas were chosen because they helped to cover the planning void between other Planning Studies. These adjacent plans are shown in the map to the left as a series of dashed boundaries.

Key Features

CAMERON VILLAGE

The Cameron Village study area is approximately 380 acres, located directly west of Downtown Raleigh. The area is generally bounded by Wade Avenue to the north, Chamberlain Street to the west, St. Mary's to the east, and stretches down to Hillsborough Street to the south.

STUDY AREA MAKEUP

The area is a mix of historic and well-established older residential neighborhoods, such as Cameron Village, University Park, and Cameron Park, with commercial and office developments focused along Oberlin Road and around the Cameron Village Shopping Center.

The area has a number of key features and important assets including:

Historic Features / Districts

- Wilson Temple United Methodist Church
- Morgan House
- Turner House
- Historic Oberlin Cemetery
- Occidental Life Insurance Building
- Plummer T. Hall House
- Willis Graves House

- Isabelle Bowen Henderson House
- Latta House and University Site
- Broughton High School
- Cameron Park Historic District
- Cameron Village Historic District
- Maiden Lane Historic District
- West Raleigh Historic District

Institutions

- Cameron Village Post Office
- Cameron Village Regional Library

Open Space

- Jaycee Park
- Latta Property
- Chamberlain Park
- Smallwood Park

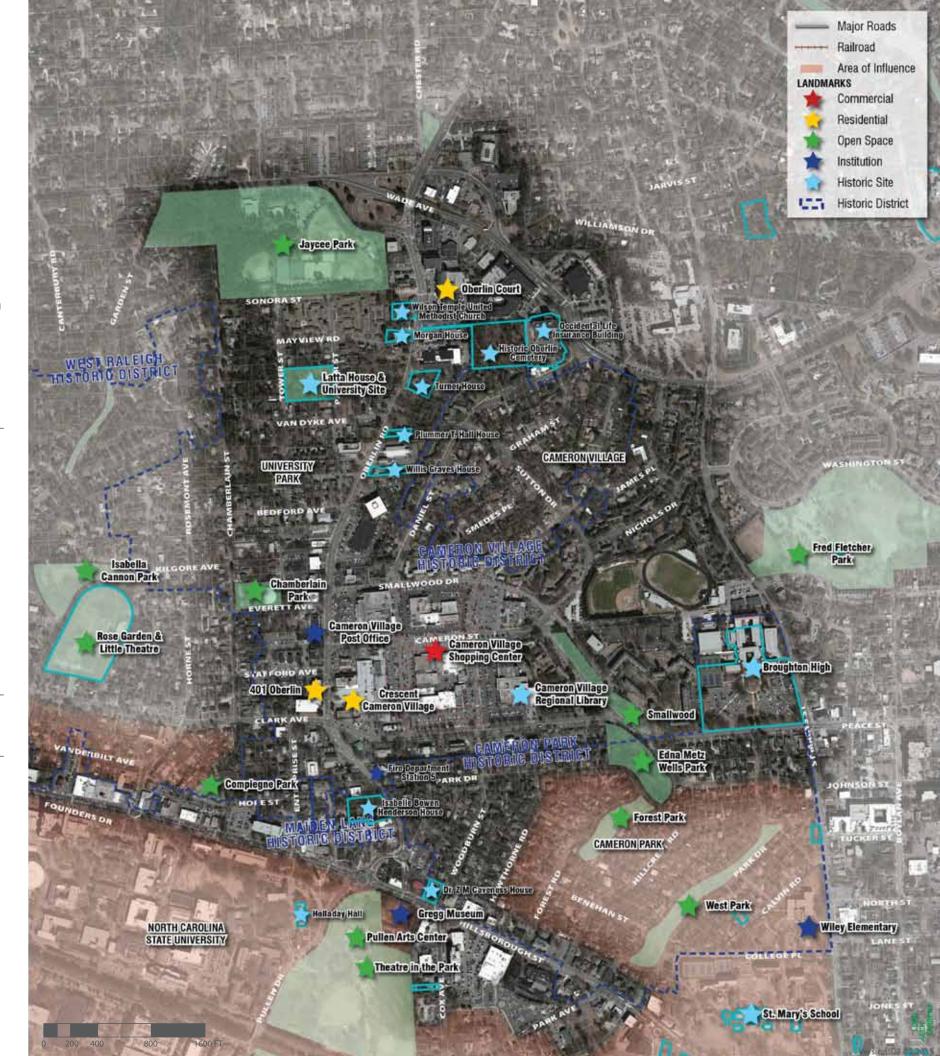
- Edna Metz Wells Park
- Forest Park
- West Park

Mixed-Use Development (Commercial and Residential)

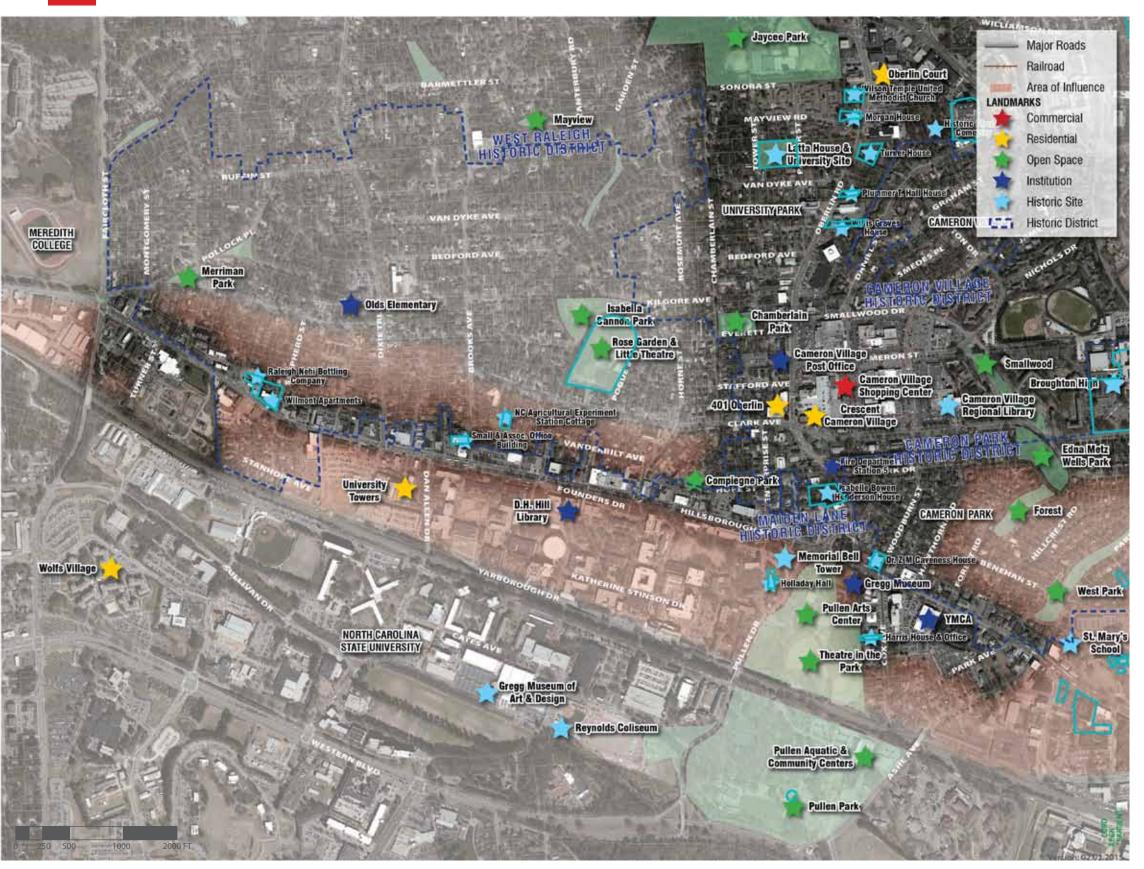
- Cameron Village Shopping Center
- Crescent Cameron Village

• 401 Oberlin

Oberlin Court



Key Features



HILLSBOROUGH STREET

The Hillsborough Street study area is approximately 105 acres, and is also located just south and west of the Cameron Village study area. The area is bounded by Faircloth Street to the west and Park Avenue to the east. The northern edge spans one or two parcels deep north of Hillsborough Street. The southern edge is mostly contained to Hillsborough Street and the limits of the NCSU campus, but dips a block or two south to include the Pullen Park neighborhood on the east end and the Turner Street neighborhood.

STUDY AREA MAKEUP

The area is mainly institutional, retail, and office centered around student activities. The area is beginning to see a resurgence of residential uses.

The area has a number of key features and important assets including:

Historic Features / Districts

- St. Mary's School
- Harris House and Office
- Gregg Museum
- Dr. Z M Caveness House
- Memorial Bell Tower
- Isabelle Bowen Henderson House
- Small & Assoc. Office Building

- Wilmont Apartments
- Raleigh Nehi Bottling Company
- Cameron Park Historic
 District
- Maiden Lane Historic District
- West Raleigh Historic District

<u>Institutions</u>

- Fire Department Station 5
- Gregg Museum

YMCA

Open Space

- Edna Metz Wells Park
- Pullen Arts Center / Park

Forest Park

Compiegne Park

West Park

Mixed-Use Development (Commercial and Residential)

University Towers

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Previous Studies In & Around the Study Area

1999 Hillsborough Street Partnership - A New Vision Hillsborough Street: Walkability and Redevelopment Study

The Plan focused on transforming Hillsborough Street from an unappealing, congested four-lane street to a two-lane street that would provide for more generous pedestrian and bicycle treatments, and help create safer interactions with vehicles. Much of this would be achieved through the use of roundabouts.

Recommendations directly from the study included:

- Two travel lanes (rather than 3 or 4)
- Two combination bus/bike lanes
- Wide sidewalks (14' minimum in commercial areas)
- New intersection designs, including roundabouts and bulb-outs
- High quality public space on University side; University Plaza and Bell Tower Square
- Two new urban villages; (1) Pullen and (2) Stanhope
- Redevelopment of existing commercial buildings and new construction following urban concepts
- Enhanced transit on Hillsborough Street
- Improved navigational aids for walking, driving, and locating parking
- Bury, reorganize, or clean up utilities
- Improved lighting
- Improved disabled accessibility (ramps, sidewalks)
- New street connections
- Improved sidewalk maintenance and public landscape
- Improved on-street parking management
- Set standards for infill of buildings



A NEW VISION HILLSBOROUGH STREET

WALKABILITY AND REDEVELOPMENT STUDY RALEIGH, NORTH CAROLINA

OCTOBER 26, 1999



Sponsored by:

Hillsborough Street Partnership

Prepared by:

WALKABLE COMMUNITIES, INC. AND TRIAS & ASSOCIATES

Dan Burden, Michael Wallwork, P.E. and Ramon Trias

Relevant Studies RALEIGH COMPREHENSIVE PLAN **Growth Framework** Expanding Housing Choices Managing Our Growth MAP F-2 Environmentally Critical Areas City Growth Centers Future Rail Stations Designing a 21st Century City: The 2030 Comprehensive Plan Urban Corridors Propose for the City of Raleigh Volume I: Comprehensive Plan Parkway Corridors Propos PAGE 8 — ISSUES & OPPORTUNITIES REPORT - 02.02.15

Previous Studies In & Around the Study Area

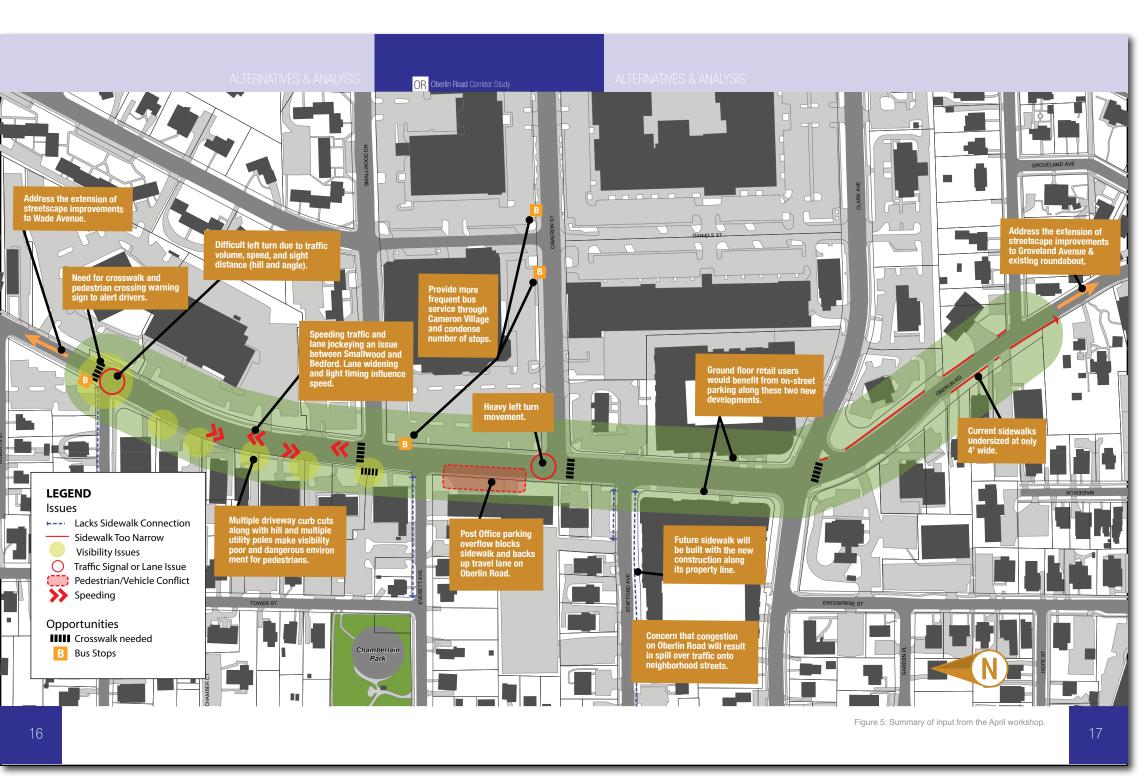
2030 Comprehensive Plan

The 2030 Comprehensive Plan is a long range policy document adopted and amended by the City Council in the Fall of 2009. The Plan establishes a vision for the City, provides policy guidance for growth and development and contains action items directed at the City to implement the vision. The Plan contains six strategic vision themes, which are referenced in every element, or chapter, of the document:

- Economic Prosperity and Equity
- Coordinating Land Use and Transportation
- Greenprint Raleigh Sustainable Development
- Growing Successful Neighborhoods and Communities

The Plan is divided into four major sections:

- Introduction and Framework
- Plan Elements
- Area Plans
- Implementation



Previous Studies In & Around the Study Area

2014 Oberlin Road Streetscape Plan

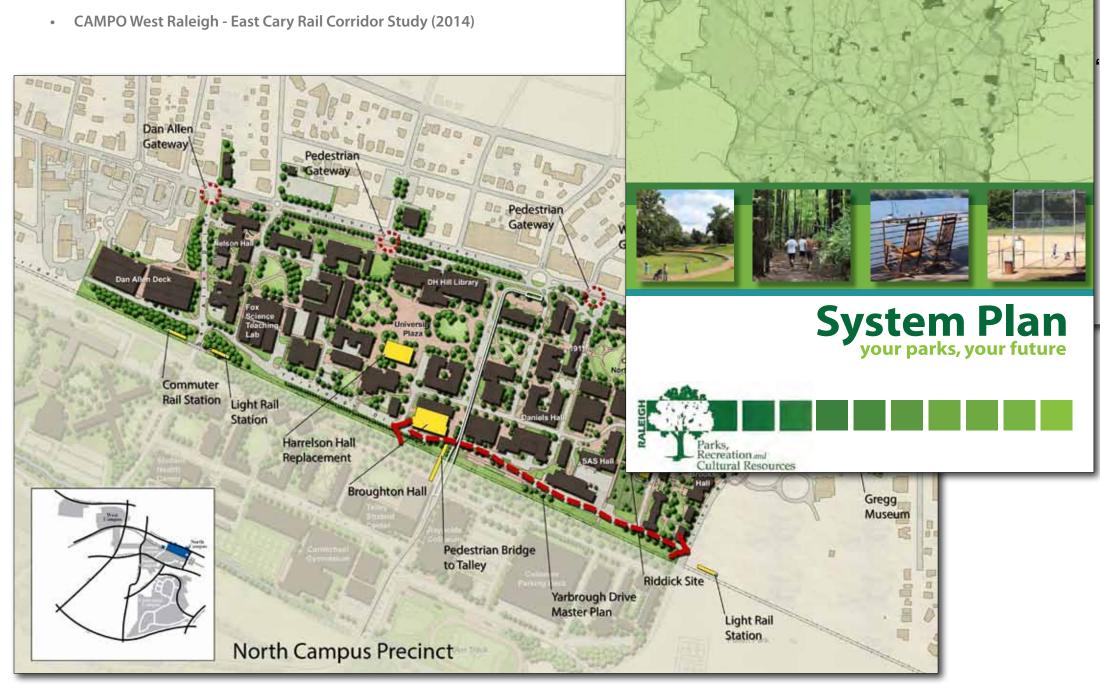
The Study was created to improve the function and character of the Oberlin Road Corridor through a series of streetscape improvement.

Recommendations included:

- Enhanced streetscape experience through, landscaping, site furnishings, lighting, etc.
- Improved/additional pedestrian crossings
- Addition of sidewalk where they do not exist today
- Traffic calming treatments
- Improved access control and reduced curb cuts
- Burying some or all of the overhead utilities
- Zero additional roundabouts
- No road diet or bike improvements were suggested in the Study

OTHER RELEVANT STUDIES CONSIDERED

- NCSU Campus Master Plan (2007)
- City of Raleigh Parks, Recreation Cultural Resources Department -System Plan (2014)





Request for Proposals

City of Raleigh

Parks, Recreation and Cultural Resources

'West Raleigh – East Cary Rail Corridor Study" FY 2014

> Capital Area Metropolitan Planning Organization Raleigh, North Carolina February 12, 2014

> > Page **1** of **32**

PRIVATELY INITIATED STUDIES IN & AROUND THE STUDY AREA 2012 Hillsborough Street Community Service Corporation - Hillsborough Street Economic Development Study

The study helped to better define the potential for redevelopment along Hillsborough Street as well as the obstacles.

Recommendations directly from the study included:

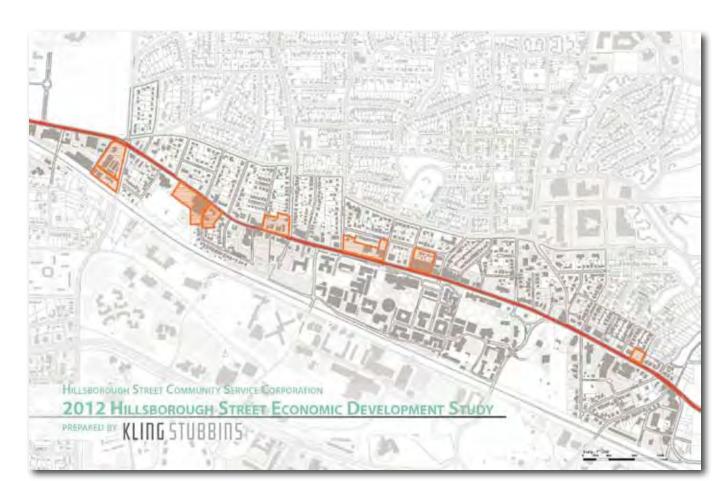
- Apply zoning categories from the UDO that accommodate greater height and densities then under current zoning to allow for higher density, transit oriented development.
- Eliminate abutting commercial zoning directly to residential zoning. Locate boundaries between commercial and residential zoning along rights-of-way where possible, rather than in the middle of blocks or use transitional zoning categories. This will reduce conflicts of scale and use between dissimilar types of development and create the opportunity for less abrupt transitions.
- The area between Hillsborough and Clark Avenue should be zoned to create a mixed-use development transition
 zone to encourage investment and attract compatible neighborhood business while preserving the integrity of
 residential neighborhoods to the north.
- Develop a strategy to provide shared, municipal parking structures to support small businesses, residential projects and other new development without adversely affecting nearby residential neighborhoods.

2014 Raleigh YIMBY – An Urban, Pedestrian Vision for Hillsborough Street

The Study was undertaken by Raleigh YIMBY ("Yes In My Back Yard") and was created to "promote livable pedestrian development with transit along urban corridors like Hillsborough Street incorporating practical, sensitive transitions to single-family home neighborhoods."

Recommendations included:

- Increase density and height of Hillsborough St. and extend denser zoning to Clark Ave. Specifically, we
 recommend heights of 7 to 10 stories on Hillsborough St. gradually reducing them to 3 to 4 stories on South side of
 Clark Avenue.
- Make all street parking 24-7 metered parking priced by market demand. Revenues from parking meters should be reinvested into additional transit options and amenities in the area, such as bus shelters with modern electronic signage announcing the bus services in order of arrival. Parking revenues could be administered for transit improvements through the HSCSC.
- · Remove all minimum parking requirements for new developments and/or new uses.
- Re-evaluate parking requirements for amplified entertainment permits.
- On Hillsborough St., allow additional uses such as bars and drinking establishments.
- On Vanderbilt and other side streets, allow uses associated with neighborhood mixed-use.
- Improve pedestrian crossings on Clark Ave.







A Historical Legacy

Both study areas are rich in history and boast numerous historic landmarks and several Historic Districts. The following are brief descriptions of the Districts from the Raleigh Historic Development Commission:

- Cameron Park the most upscale of Raleigh's three early-twentieth-century suburbs, unabashedly aimed at the upper-middle-class
- Cameron Village the state's first mixed-used subdivision
- Maiden Lane Historic District a streetcar suburb made more desirable by R. Stanhope Pullen's donation of land for a university and park
- West Raleigh Historic District an early automobile suburb associated with the growth of North Carolina State University

HILLSBOROUGH STREET (1792)

Formerly known as Hillsboro Road, it was first constructed from the plantation of David Cameron (original founder of St. Mary's College, now St. Mary's School) in 1792 as part of the Capitol's original layout. One of the four original streets planned to radiate outward in the cardinal directions from Capitol Square, each leading to one of the former State Capital cities, Hillsborough Street's purpose was to connect Raleigh to the town of the same name to the West.

Today, Hillsborough Street is home to numerous events that include: Homecoming Parade, Hillsborough Hike, the North Carolina State Fair and many others.











A Historical Legacy

OBERLIN VILLAGE (1866)

Before the Civil War one of the largest slave owners in North Carolina owned much of the land in and around Cameron Village. Following the Civil War, the land was divided and a portion became one of Raleigh's first freedmen communities.

A former slave, James E. Harris, established Oberlin Village in 1866 and named it for his alma mater, Oberlin College in Ohio. The 149 acres primarily consisted of farmland, which the freedmen worked.

Today, a few original Victorian homes and 145 monuments in the historic Oberlin Village Cemetery remain. Friends of Oberlin Village and the Raleigh Historic Development Commission are working together to pursue Raleigh Historic Landmark designation for the cemetery.

CAMERON VILLAGE (1947)

Cameron Village was first developed as a postwar suburb and was based on the Country Club District, the first shopping center in the world organized to accommodate the car. Cameron Village emulated the ground-breaking Kansas City residential neighborhood and city planning icon and sought to bring high design to Raleigh's middle class.



Victorian home in Oberlin Village



Oberlin Village Cemetery



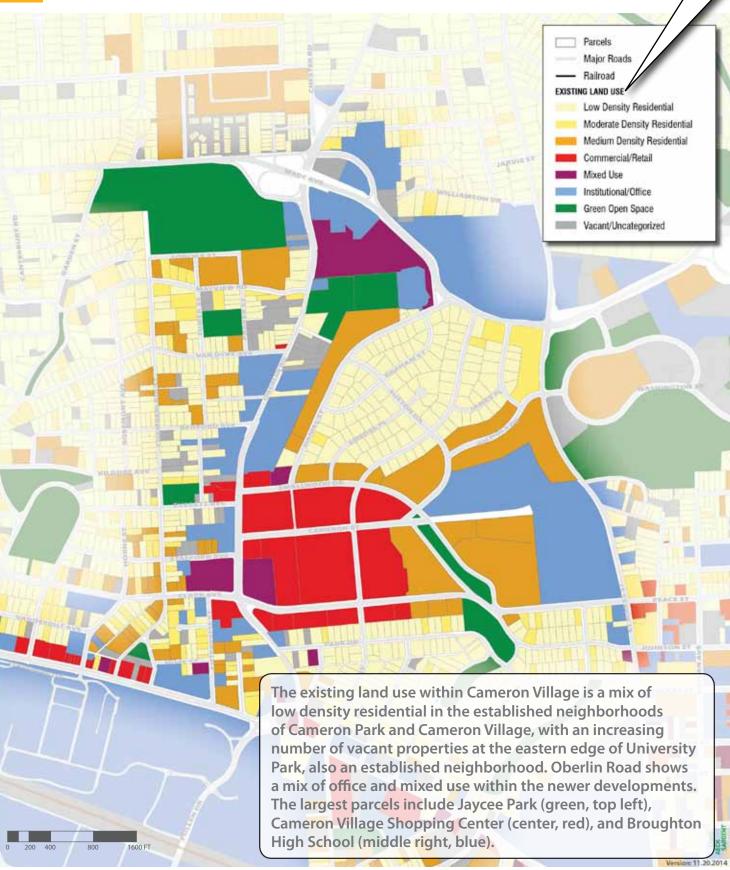
Cameron Village Shopping Center

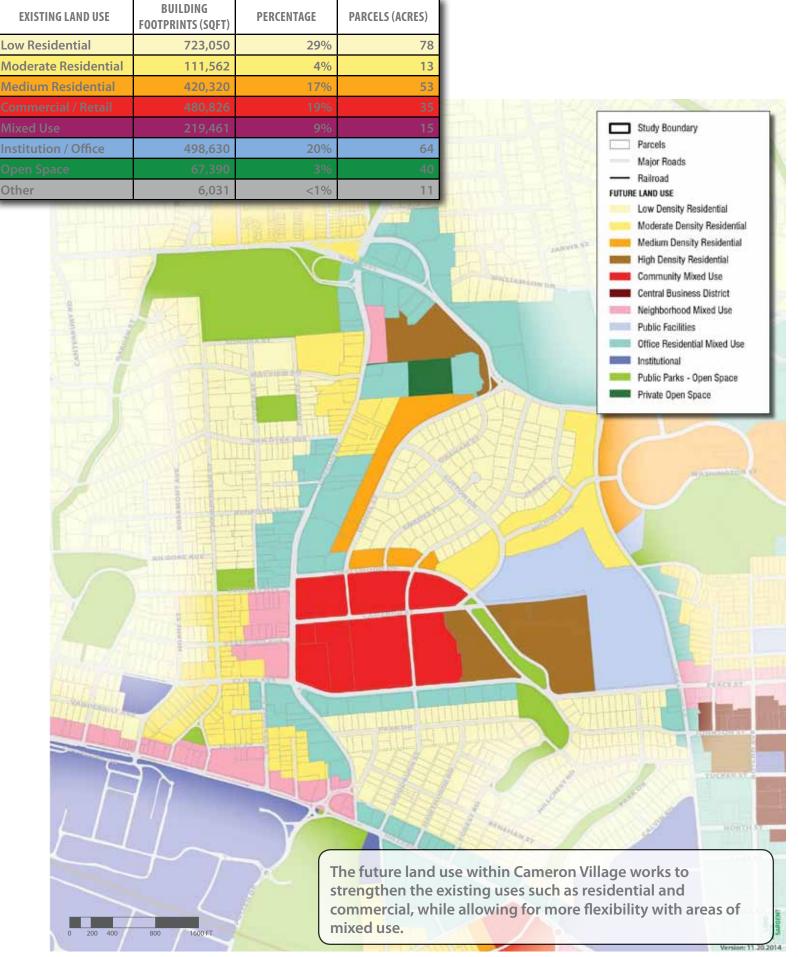




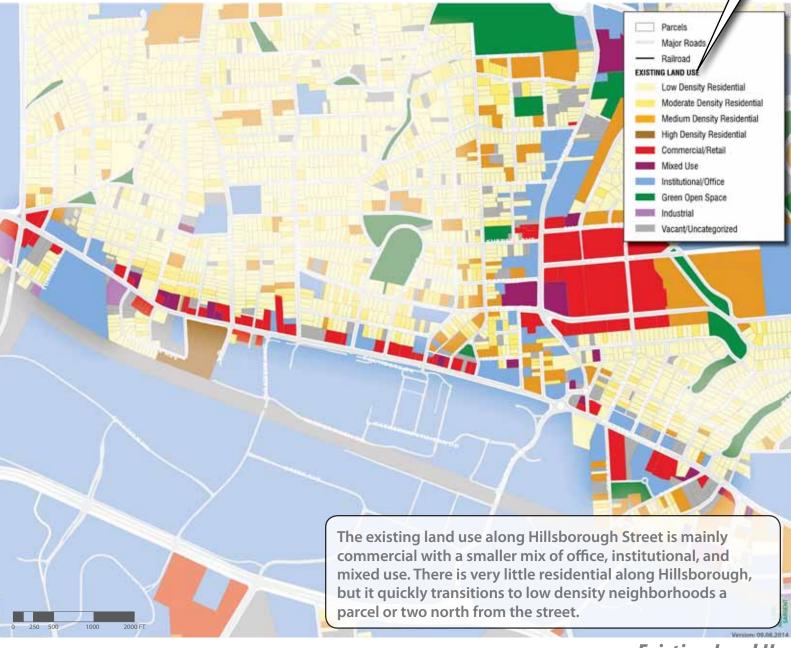


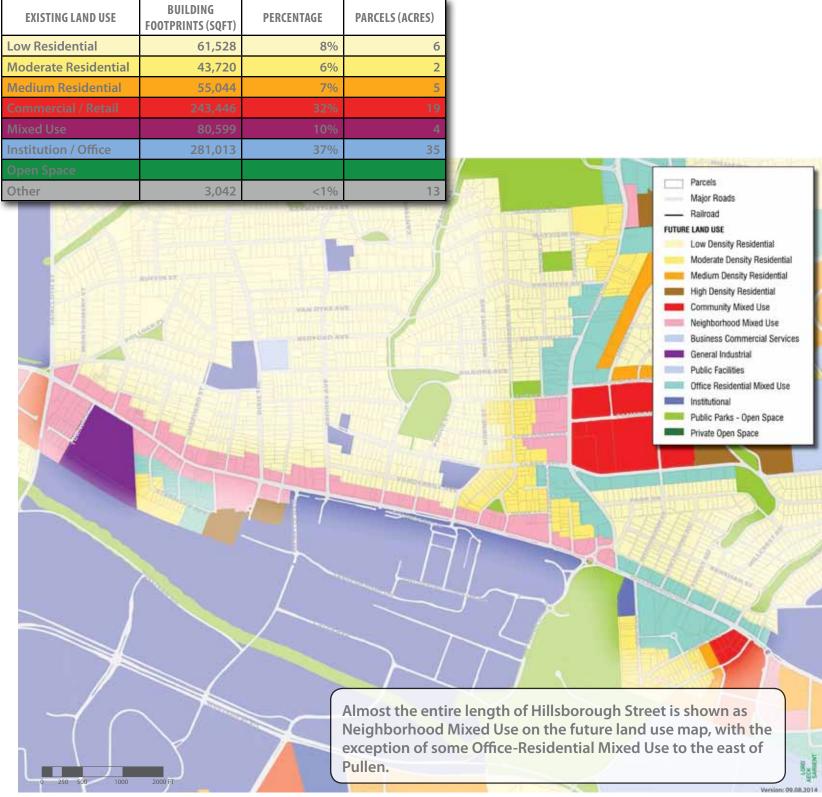
Land Use





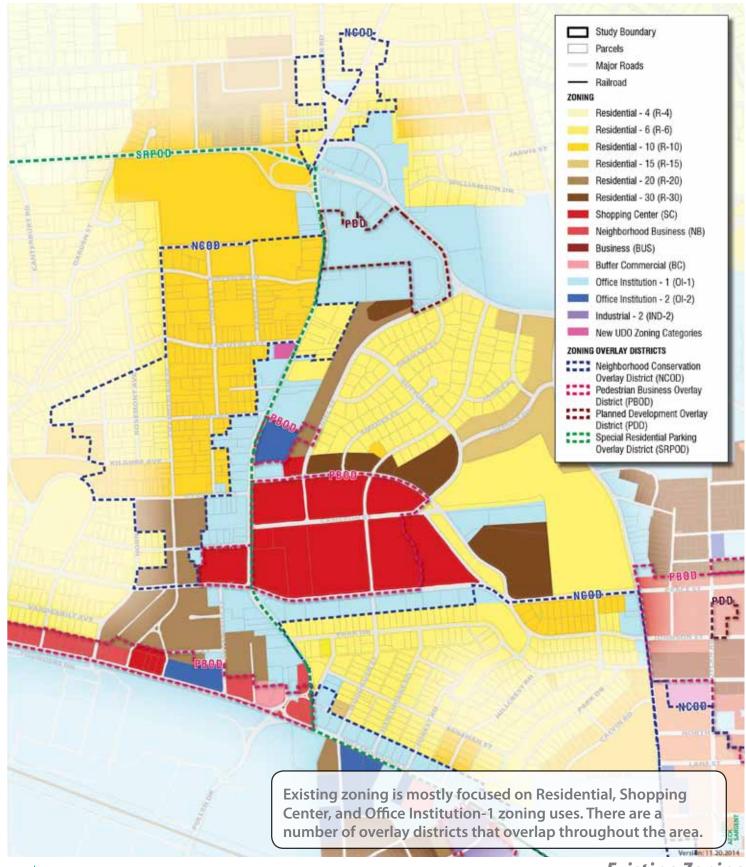
and Use

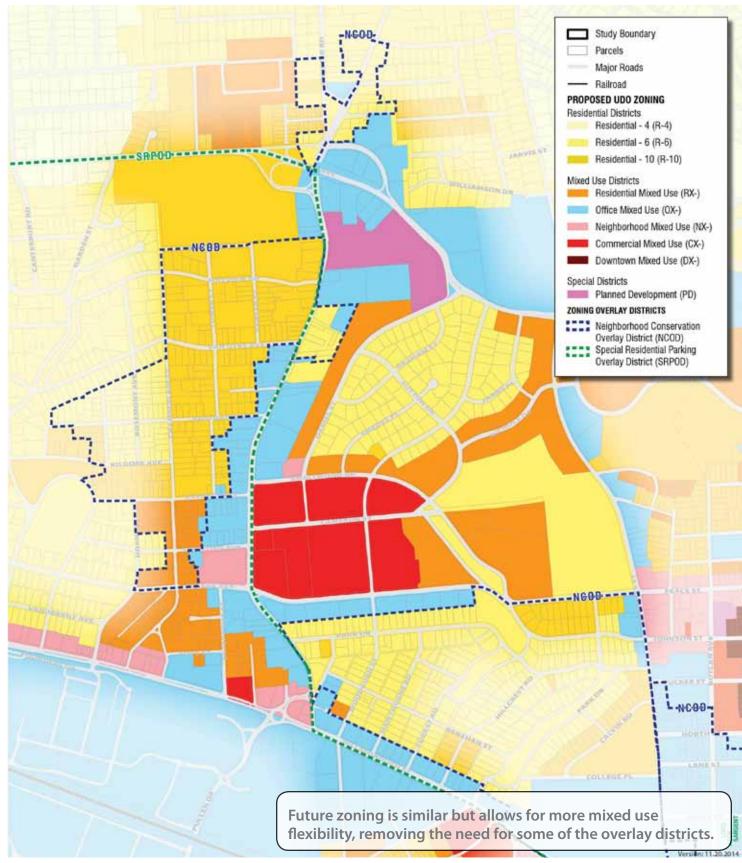




Future Land Use Existing Land Use

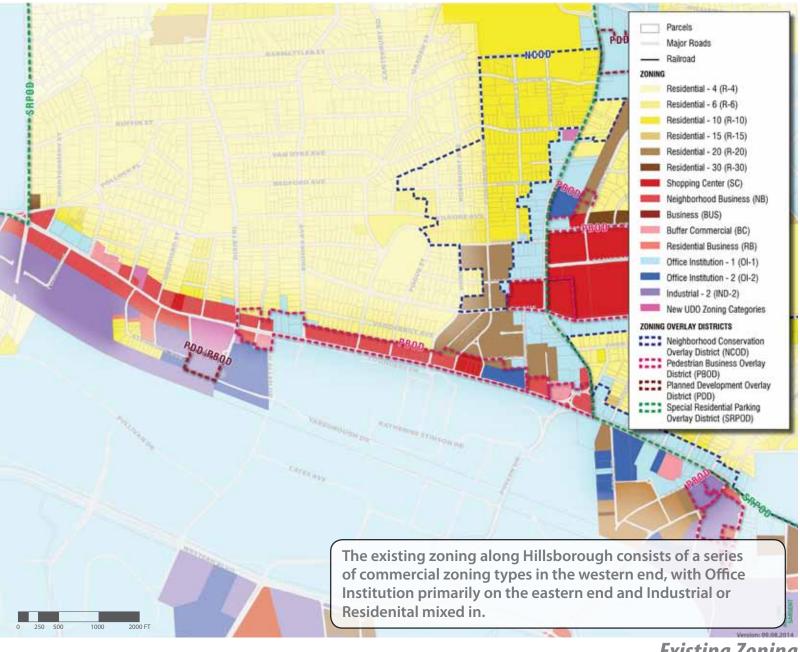
Zoning

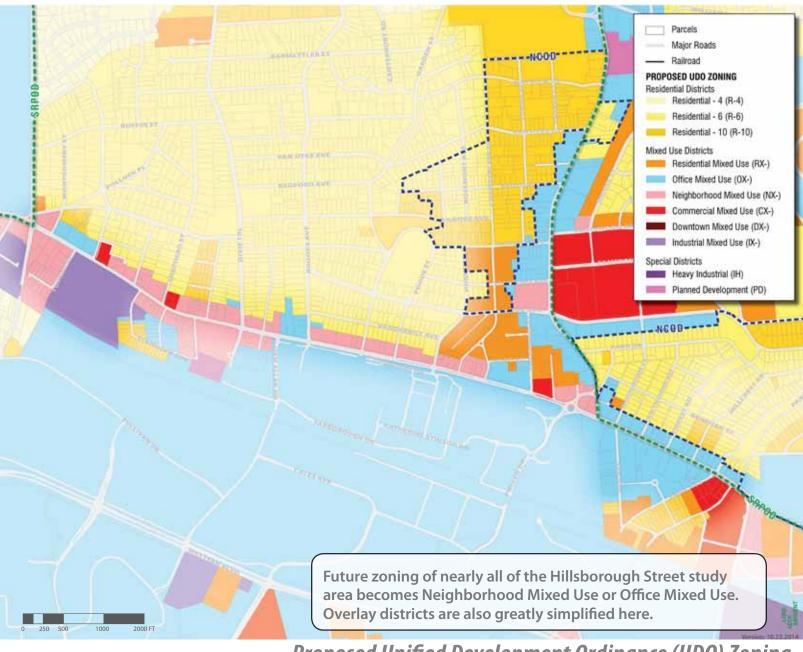




Proposed Unified Development Ordinance (UDO) Zoning

oning





Existing Zoning

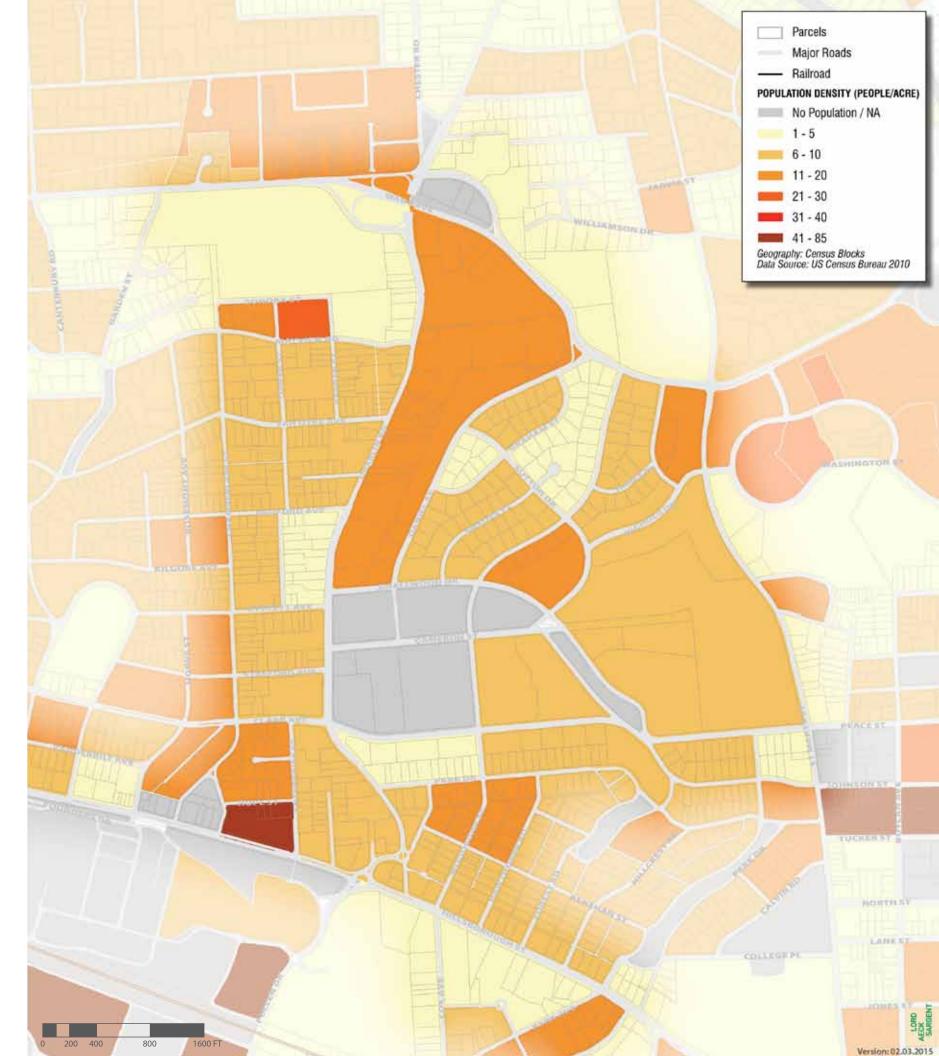
Proposed Unified Development Ordinance (UDO) Zoning

Population Density

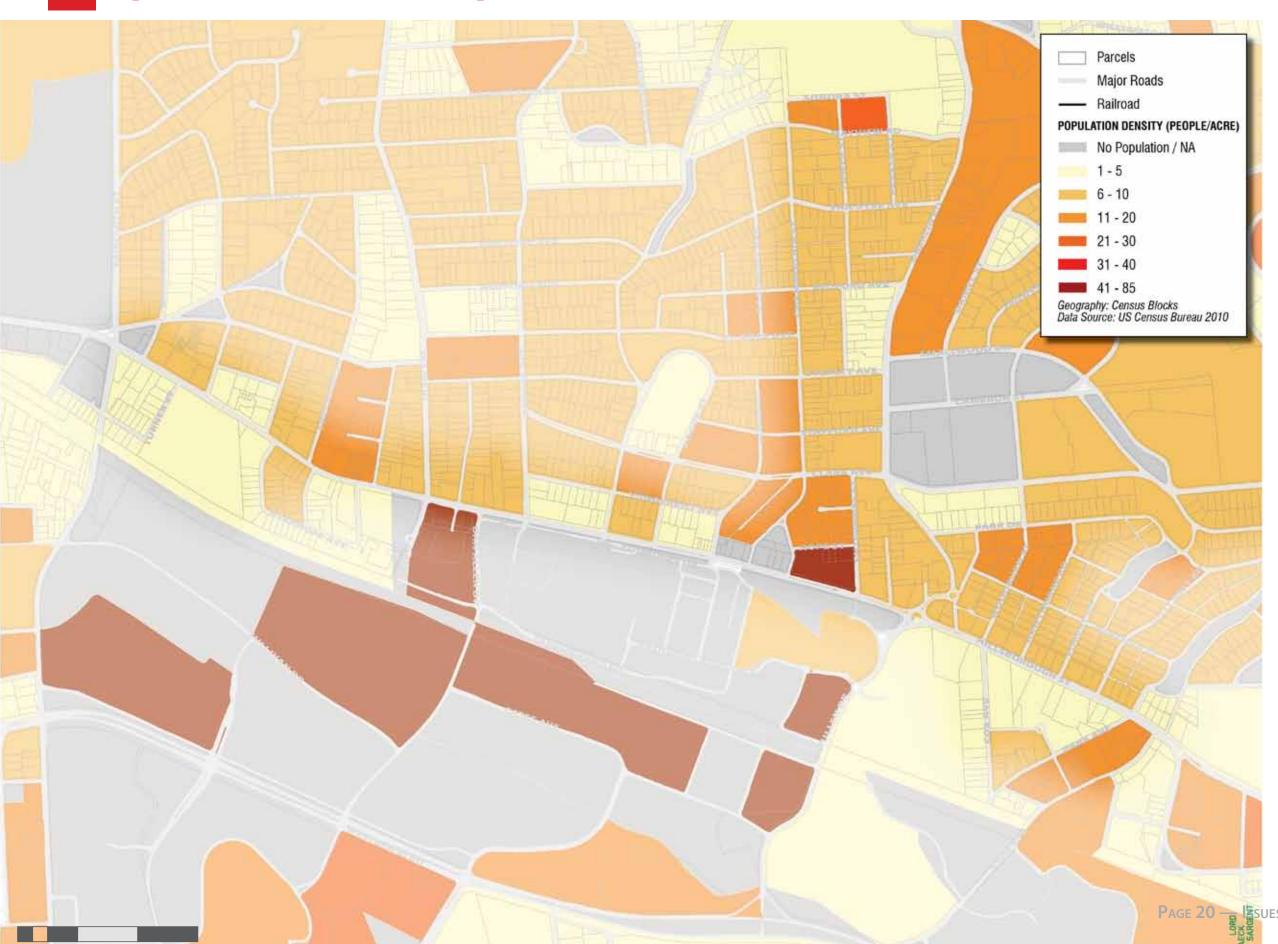
CAMERON **V**ILLAGE

Overall the population density is relatively low in the Cameron Village study area except for concentrations of higher population density along Oberlin Road and Wade Avenue, where there is multi-family development.

Population has increased with newer developments and this map will look different over the next 5-10 years with the recent addition of new mixed use development along Oberlin and Clark.



Population Density

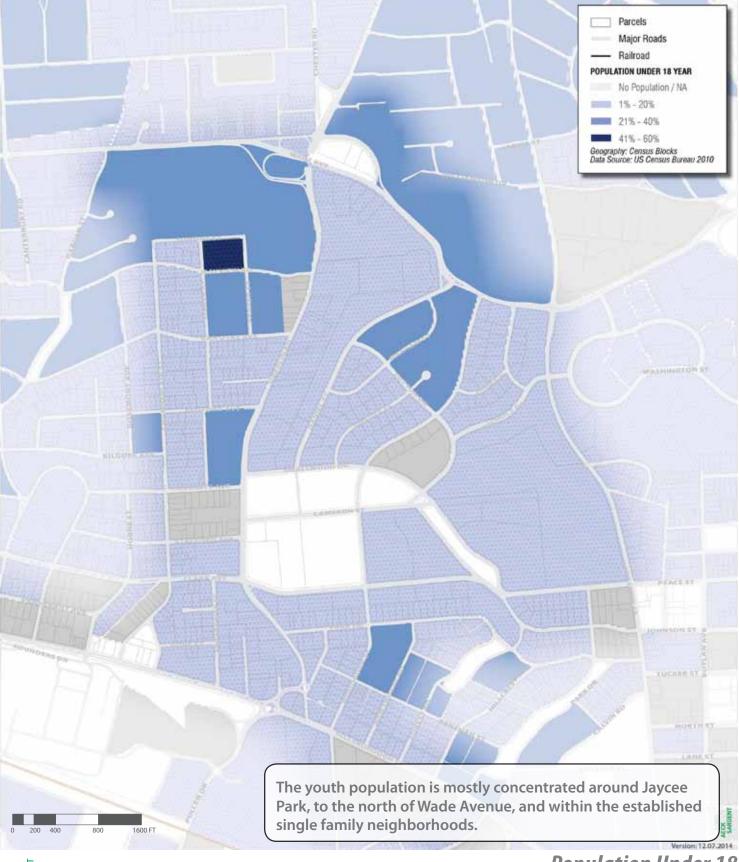


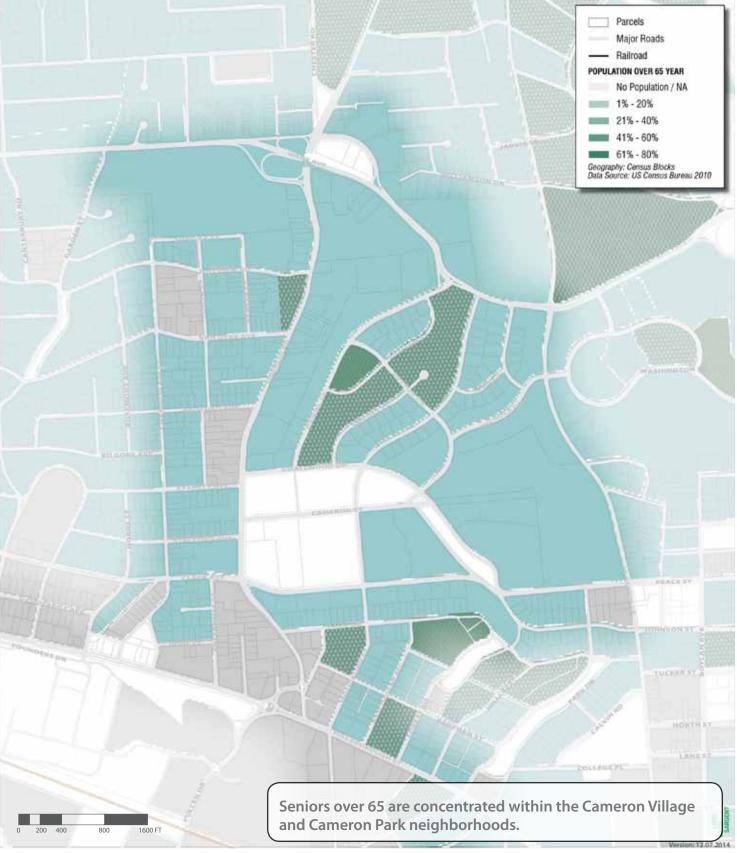
HILLSBOROUGH STREET

Although Hillsborough Street itself has little residential, population density is calculated by Census Block. Density counts reflect singlefamily and multi-family development between Hillsborough Street and Clark Avenue.

Version: 02.03.2015

Population By Age

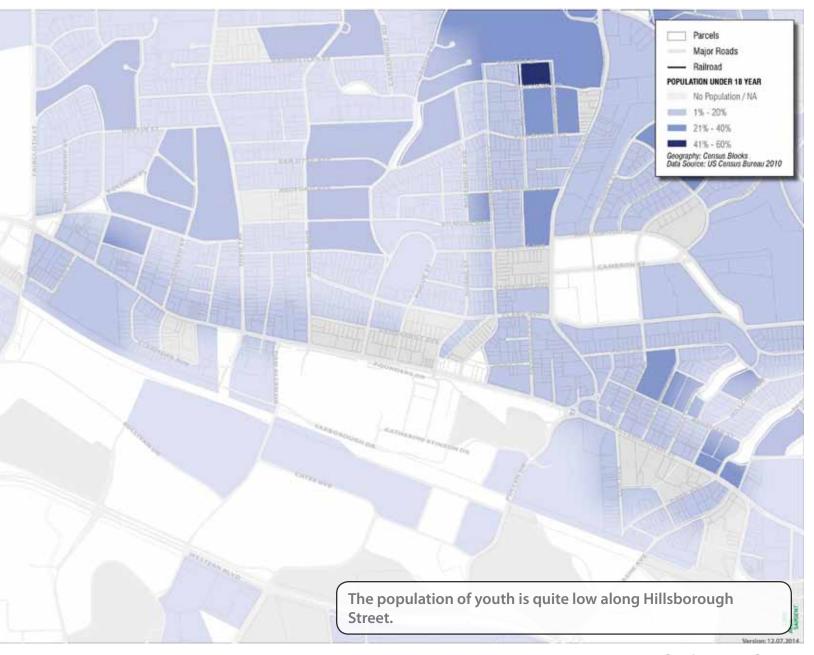






Population Under 18

Population By Age





Population Under 18

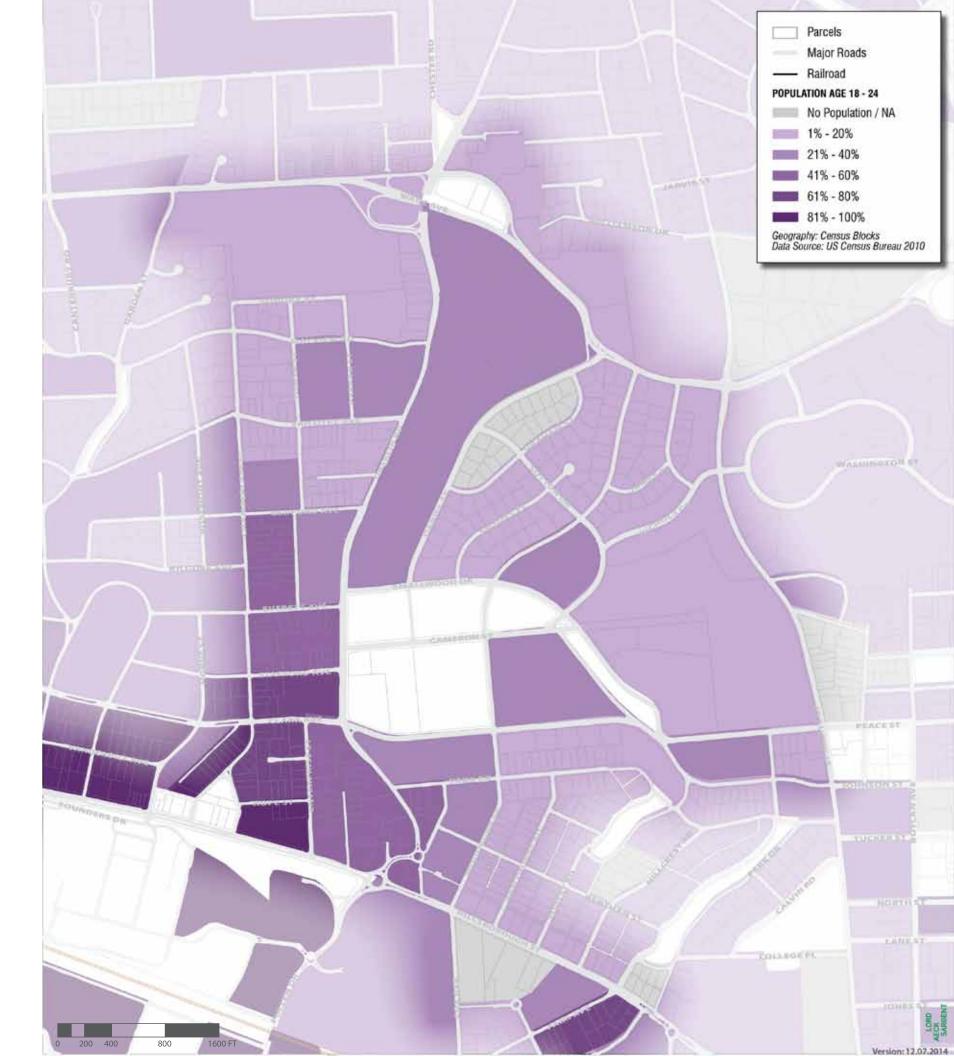
Population 65 and Over



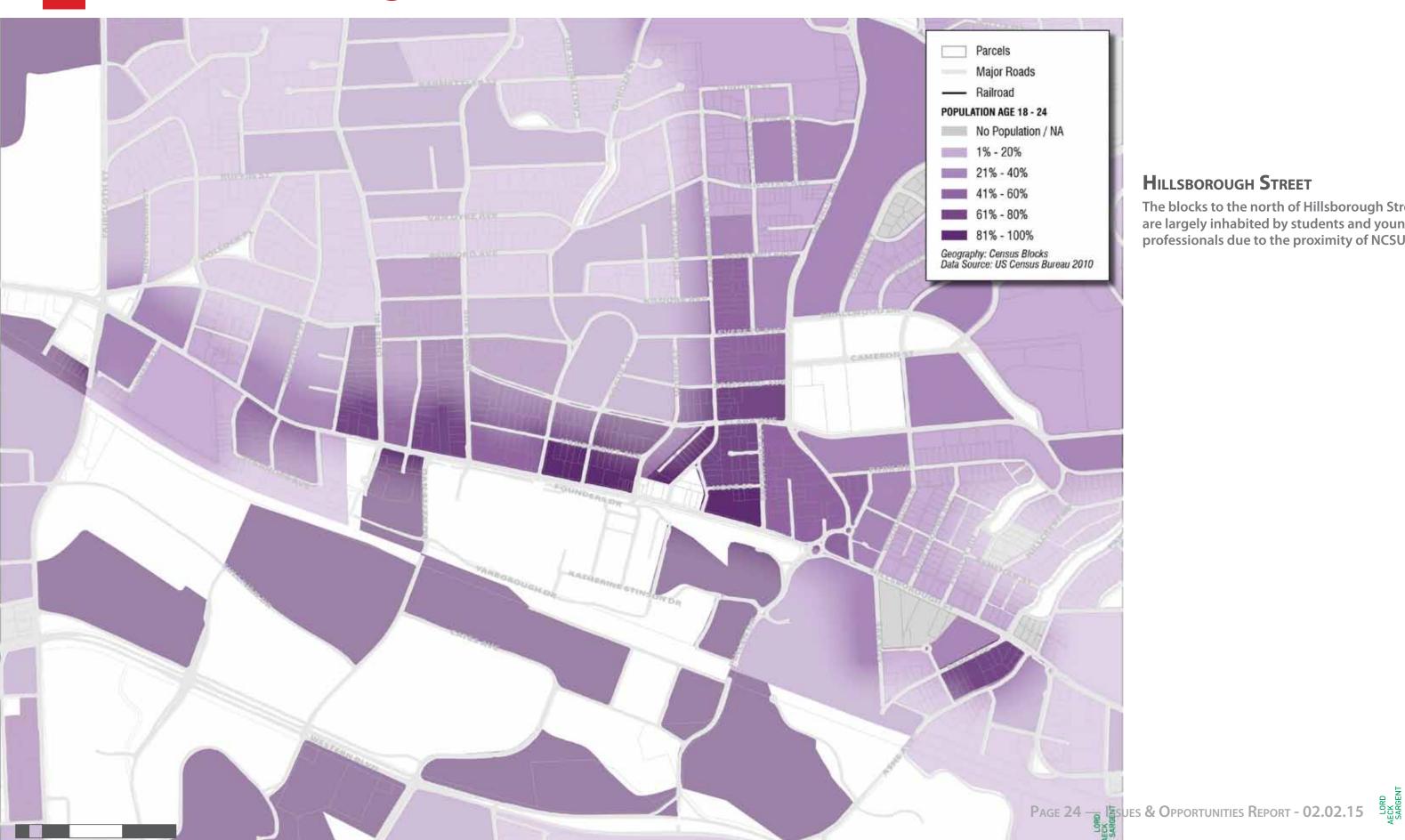
Student & Young Adults

CAMERON VILLAGE

Students and young adults are concentrated along the Oberlin corridor and closer to the NCSU campus



Student & Young Adults



HILLSBOROUGH STREET

The blocks to the north of Hillsborough Street are largely inhabited by students and young professionals due to the proximity of NCSU.

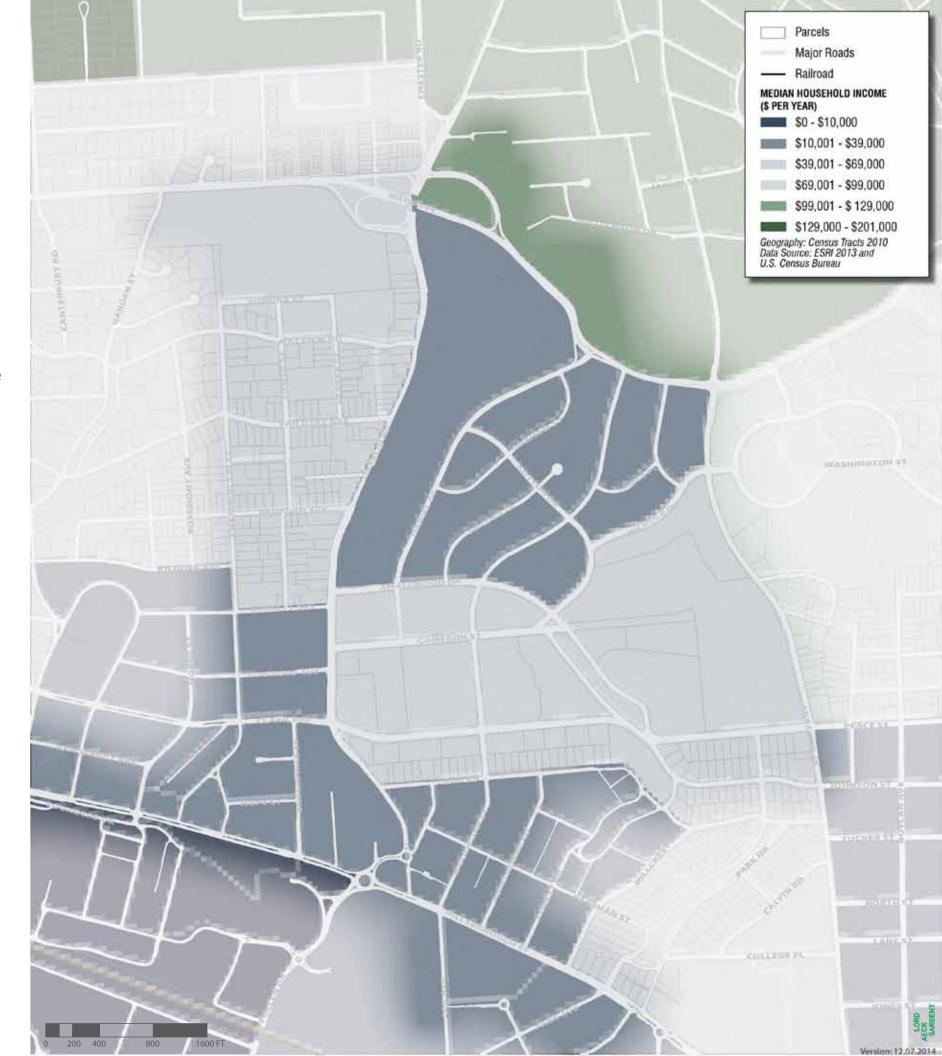
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Median Household Income

CAMERON **V**ILLAGE

The study area shows lower to moderate median household income compared to the neighborhoods to the north and east.

The range is showing from \$10,000 - \$69,000 median annual household income for the study area.



Median Household Income



HILLSBOROUGH STREET

The study area exhibits lower to moderate median household income compared to the neighborhood to north.

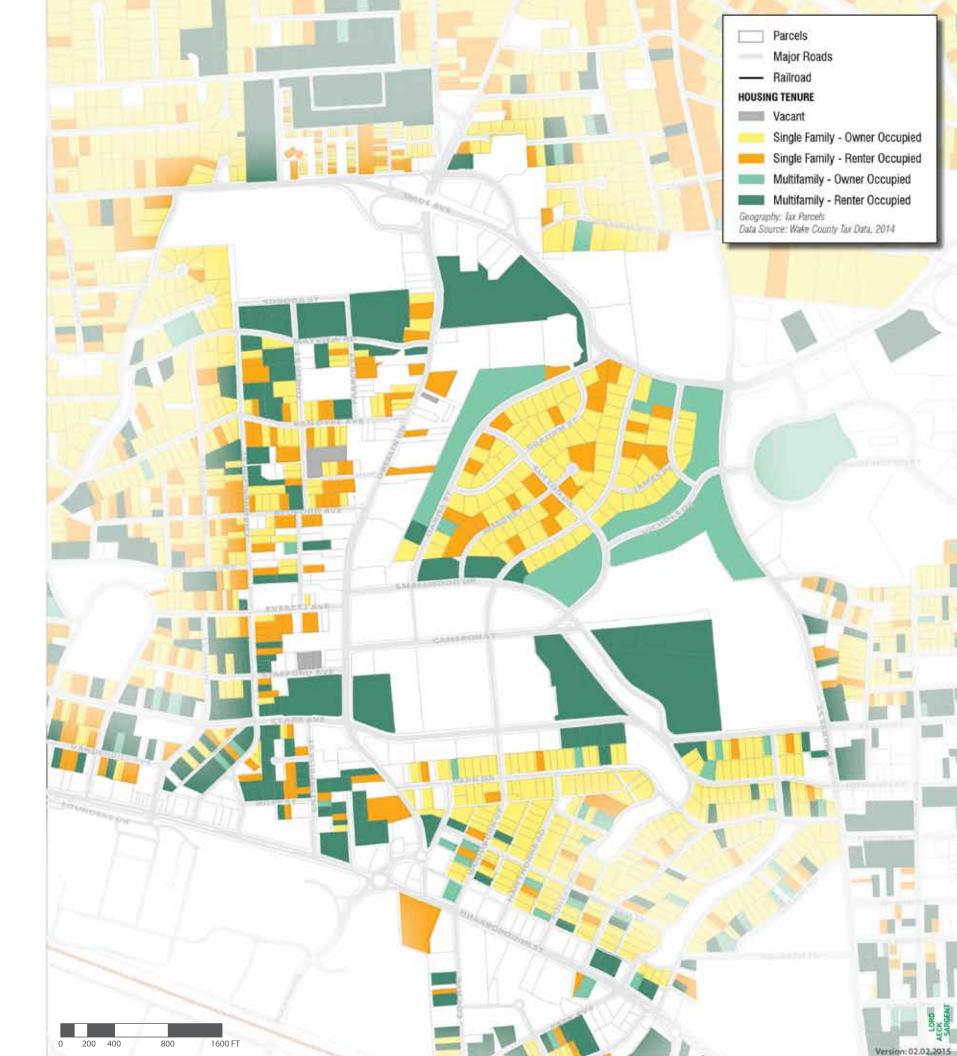
The median annual household income in the eastern portion of the study area ranges from \$10,000 - \$39,000 per year, while in the western portion it ranges from \$39,001 -\$69,000.

ousing Tenure: Parcel-Based

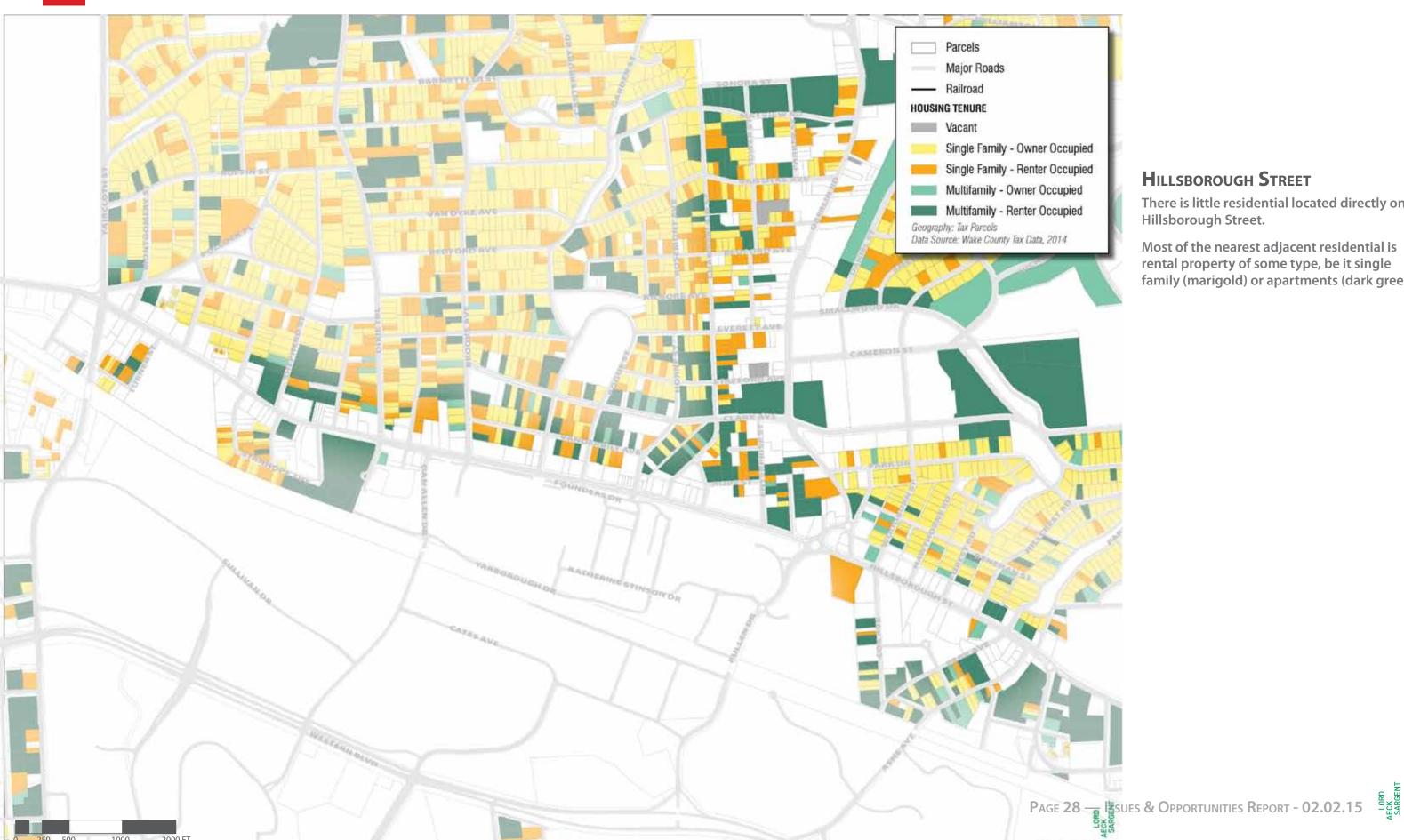
CAMERON VILLAGE

The Cameron Park and Cameron Village neighborhoods are more heavily owner occupied than University Park.

The occurrence of renter-occupied houses and apartments (shown in marigold and dark green) increases in the area closer to the university campus.



Lousing Tenure: Parcel-Based



HILLSBOROUGH STREET

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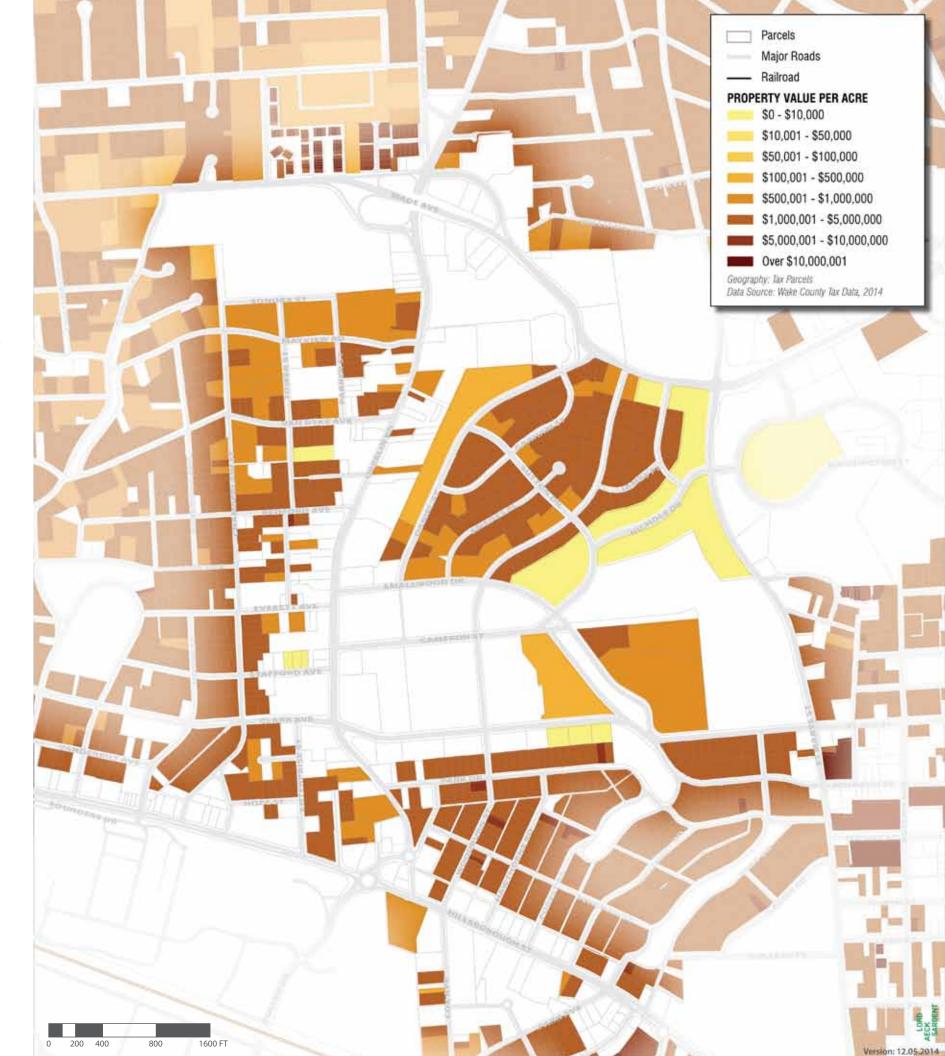
There is little residential located directly on Hillsborough Street.

Most of the nearest adjacent residential is rental property of some type, be it single family (marigold) or apartments (dark green).

Property Value Residential

CAMERON **V**ILLAGE

There is a correlation between the more heavily single-family, owner-occupied neighborhoods and the property value. For instance, Cameron Park shows the highest overall higher property values per acre in the study area.

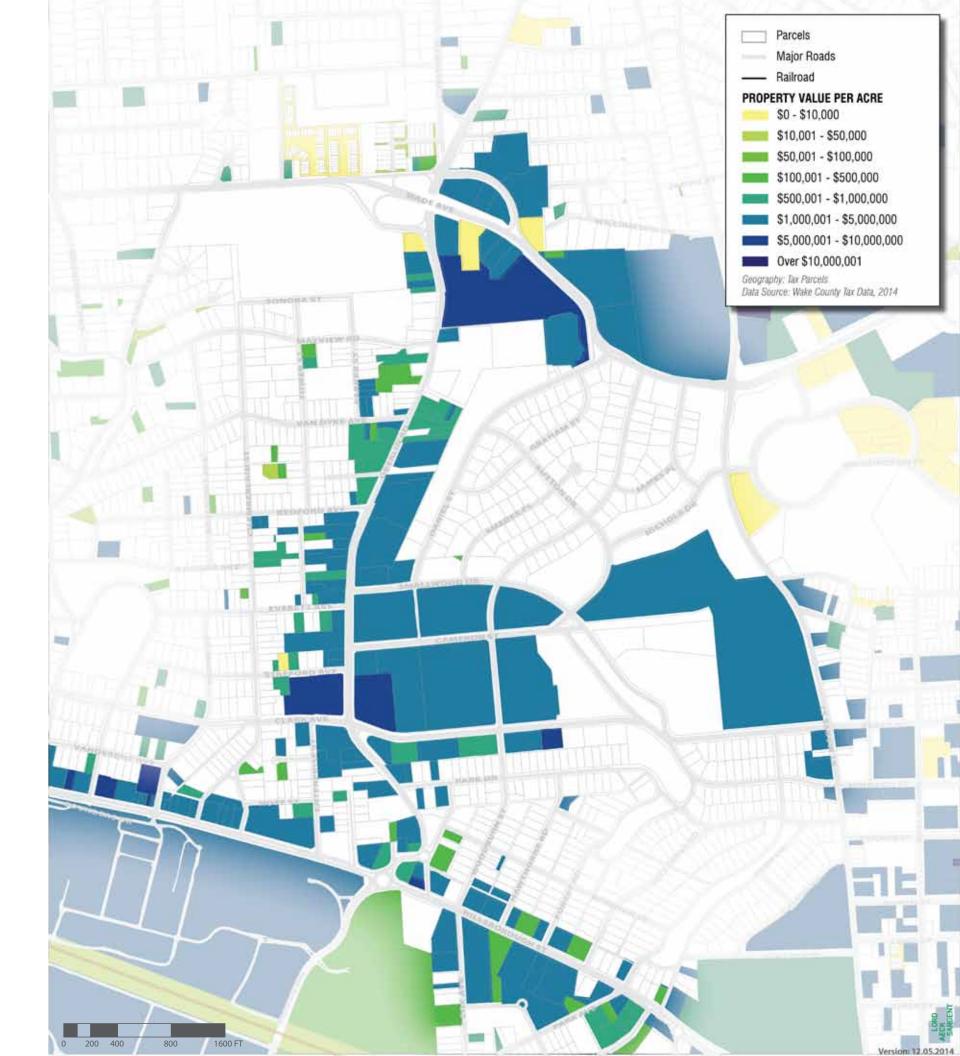


Property Value Non-Residential

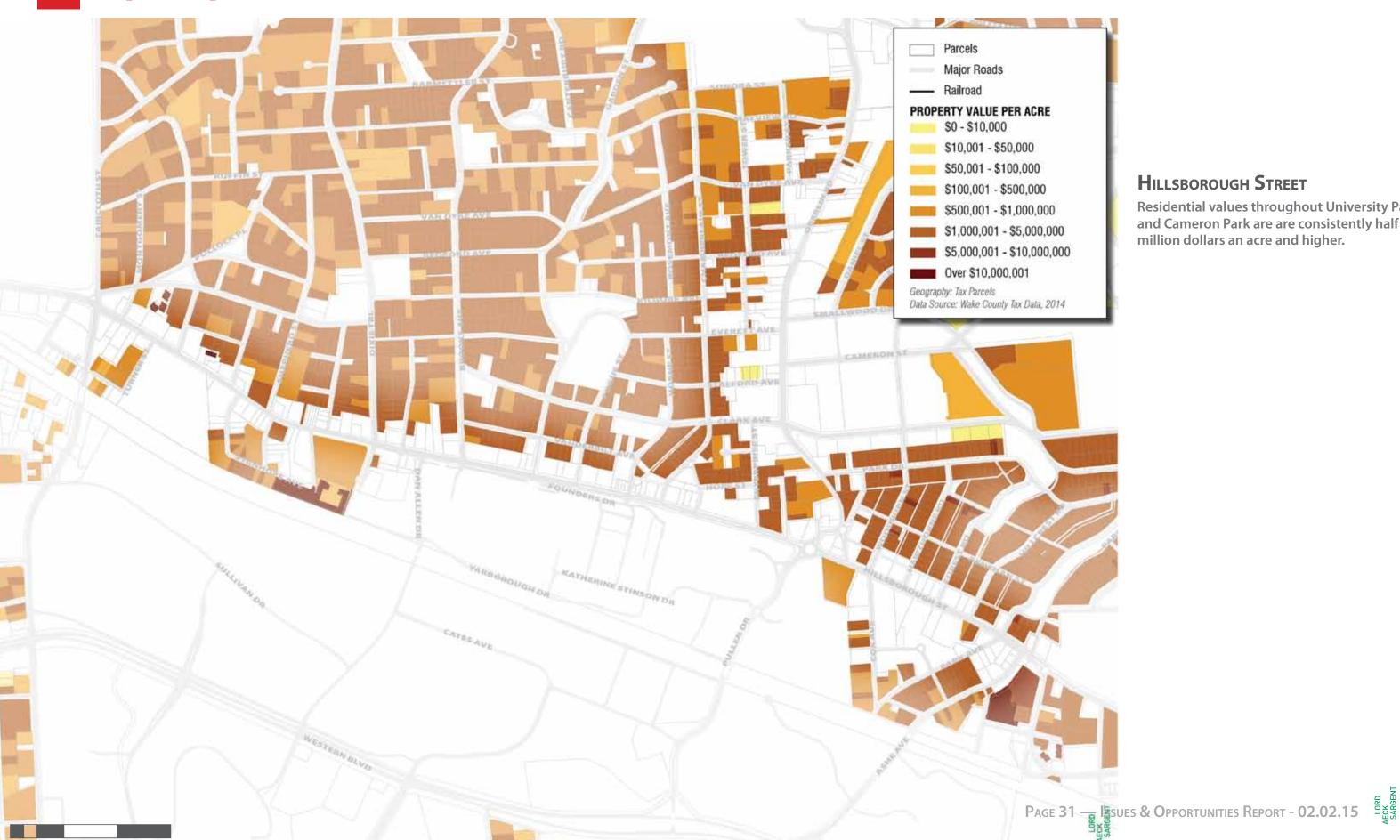
CAMERON **V**ILLAGE

Property values are highest at the newest developments like Wade-Oberlin, 401 Oberlin, and Crescent Cameron Village.

Overall the value per acre is fairly even throughout except in parcels that are surrounded primarily by residential neighborhoods or with access issues.



Property Value - Residential



HILLSBOROUGH STREET

Version: 12.07.2014

Residential values throughout University Park and Cameron Park are are consistently half a million dollars an acre and higher.

Property Value - Non-Residential



HILLSBOROUGH STREET

Property values per acre along Hillsborough Street fall in the mid-range.

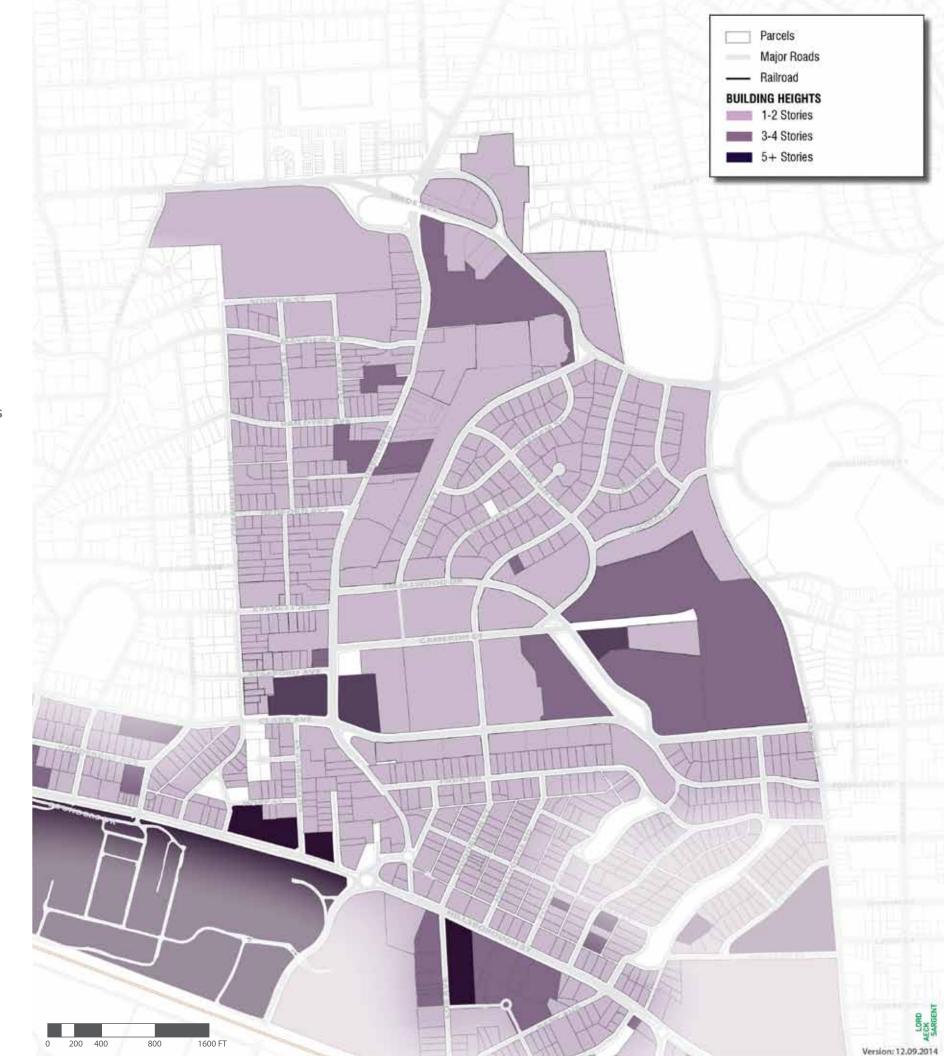
Value begins to fall a bit on the Western end of Hillsborough.

Building Height

CAMERON **V**ILLAGE

Building heights range from 1-8 stories within this area, but on average stay between 1 and 2 stories as a result of the frequent occurrence of single family and low density multi-family residential.

Higher building heights exist along Oberlin Road and areas of lower topography like along Smallwood and Bellwood Drives where the buildings can be tucked into the hills surrounding.



Building Height



HILLSBOROUGH STREET

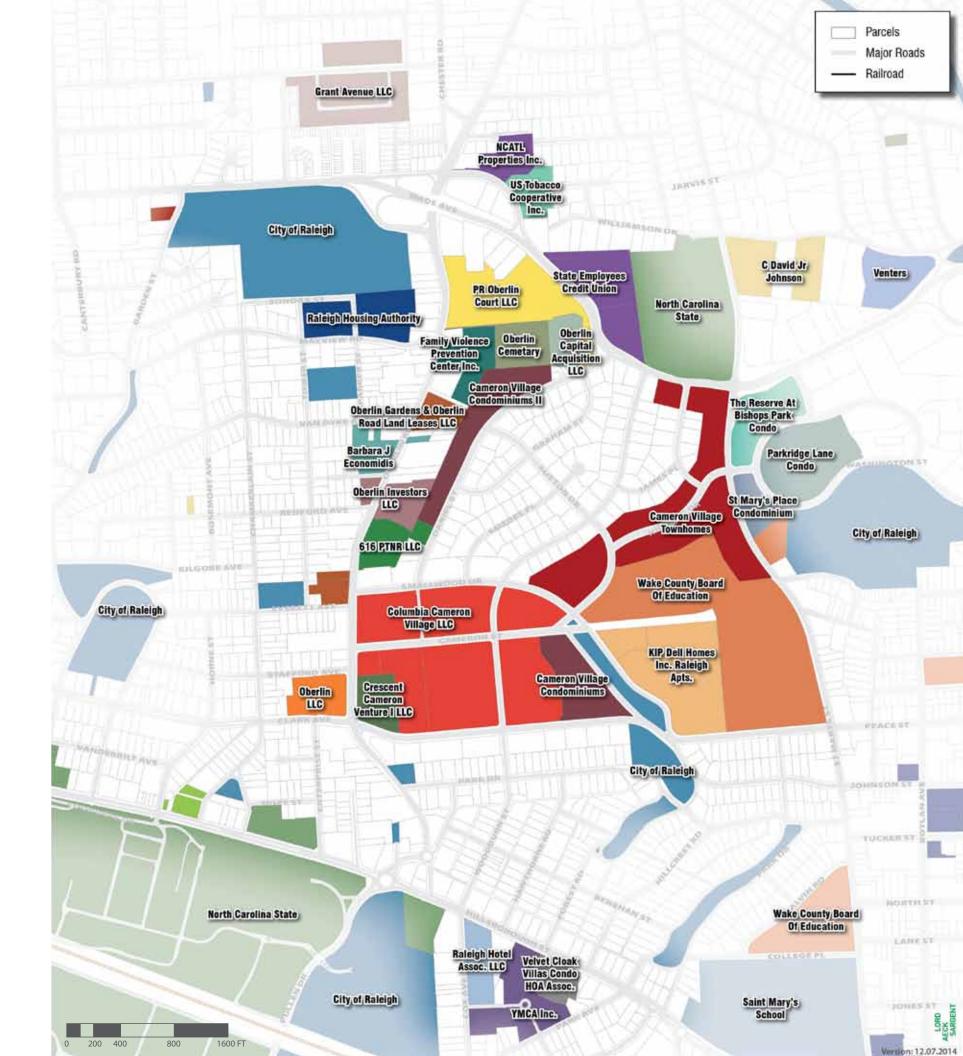
Buildings along Hillsborough Street mostly range 1-2 stories, except for recent redevelopments such the Aloft and Stanhope that are currently under construction.

A few buildings in the eastern portion of the study area are higher taller, such as the YMCA and the hotels along the southern side of the

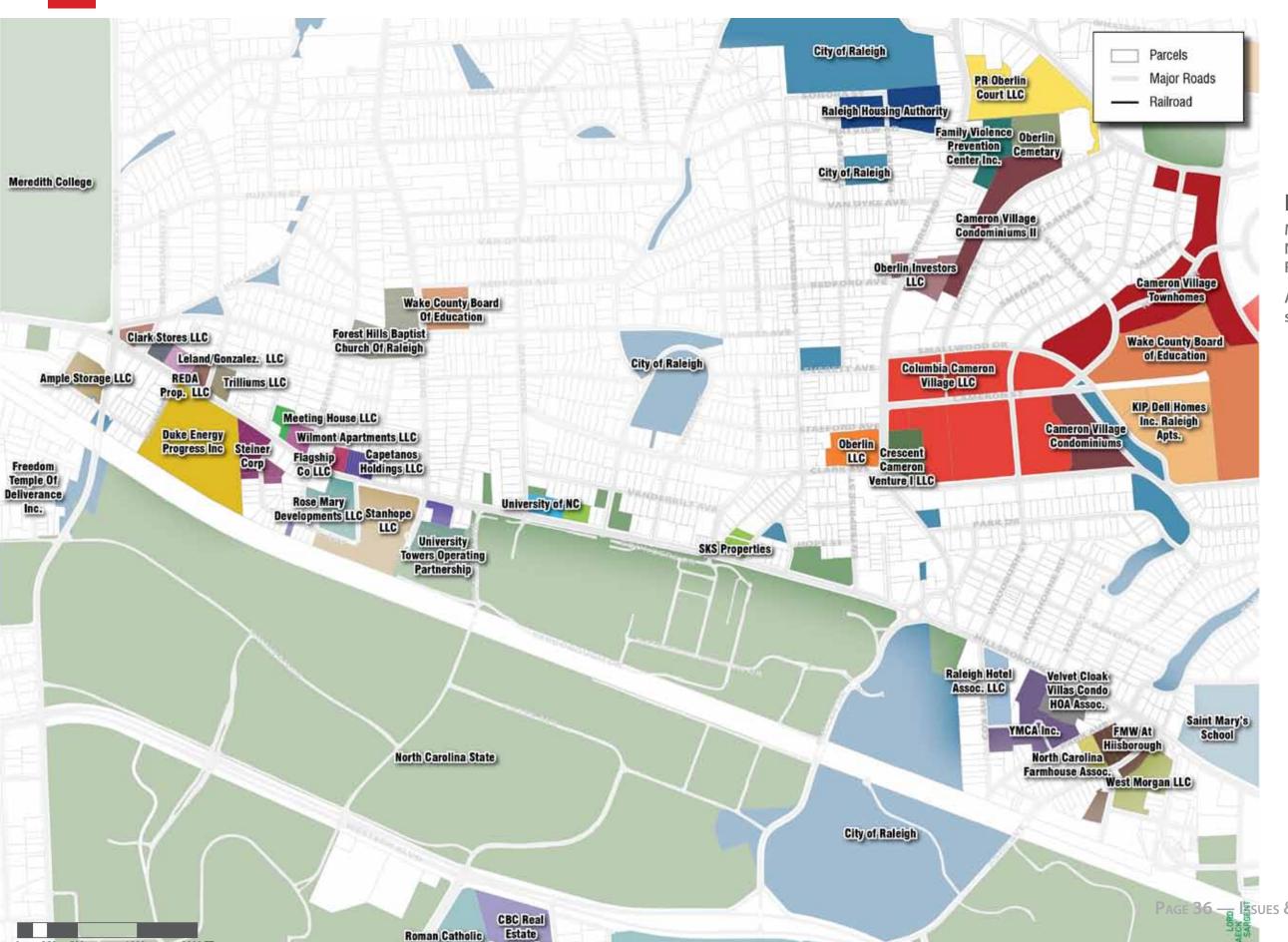
Property Ownership

CAMERON **V**ILLAGE

Multiple property owners exist within Cameron Village study area. Major property owners include commercial and multi-family developments, such as Cameron Village LLC and the Cameron Village Townhouses (although they are technically a condominium association).



roperty Ownership



Diocese

HILLSBOROUGH STREET

Major property owner in the vicinity includes North Carolina State University and the City of Raleigh.

Aside from large institutional owners, parcels sizes are small and ownership fractured.

Version: 12.07.2014



Market Analysis

 Cameron Village has the market advantage of being established, having a critical mass of retailers, having slightly larger properties, being surrounded by strong demographics and being close to Downtown.

Hillsborough Street has the advantage of being proximate to NC State, has a more urban, walkable character, more integrated open space and institutions, a relatively more accessible regional artery and long-term regional potential at a light rail line and at its western end with freeway access.

2. Cameron Village is challenged by its lack of regional access and its lack of pedestrian/bicycle orientation.

Hillsborough Street is challenged by its student-oriented perception, the availability of convenient parking and its small parcel size.

3. Demographically, Raleigh and the study area are growing relatively quickly and have quickly increasing incomes. The majority of the growth recently and projected is in households aged 25-44, but downsizing baby boomers are also showing signs of growth. Both of these demographic groups are more likely to value urban character and low maintenance housing. In terms of housing tenure, existing conditions of growing rental demand are likely to continue more quickly than for-sale.





Market Analysis

- 4. Retail is strong intown and within the study area, but a larger part of the unmet demand is in larger footprint retail not easy to accommodate in the study area. Some limited opportunities for larger scale retail exist with mixed-use redevelopment within the core of Cameron Village and perhaps longer term on the western end of Hillsborough Street (around the BeltLine and Fairgrounds). Current demand for the study area given land constraints is estimated at 210,000 sqft, including restaurants and a wide range of retail categories. NCG estimates that each new future resident adds demand for approximately 40 sqft. of retail for reference.
- Office demand is driven by small businesses, adjacency to Downtown and growing residential areas. Demand is mostly for Class B space, including new product, oriented to small businesses and with an urban character. Demand is estimated at up to 25,000 sqft annually with the combined study area.
- 6. Rental housing demand is very high with the exception of short-term demand for additional student housing. Demand is projected for approximately 170 units annually, primary short term markets are for young professionals and increasingly empty nesters.





Market Analysis

- 7. For-sale housing demand is growing for attached products of townhomes and condos. But, condo developments will likely be small-scale developments of 50 or less units. Land availability and land value are challenging, but demand exists for approximately 35 townhomes and 45 condos annually.
- 8. Land values and property size are extremely challenging, particularly in the eastern portions of the combined study area. In Cameron Village and along Oberlin Road, redevelopment pressure is expected to primarily follow recent trends of redevelopment for multi-family housing and mixed use of greater than 100 units/acre. On Hillsborough Street, land values and existing lot coverage would necessitate redevelopment of approximately 5 stories, with properties with high lot coverage and/or higher value existing retail rents likely necessitating 7 stories. This will need to inform studies of transitional height, parking and zoning.
- 9. Development pressure can be expected to continue in three primary areas the eastern end of Hillsborough Street around the YMCA, around the Cameron Village core and in the eastern end of the Hillsborough Street retail core and the transition area connecting that retail core to Cameron Village.



Redevelopment Pressure

SOFT SITE ANALYSIS

Soft sites have a likelihood of being redeveloped if public sector actions and/or market trends raise the value that can be realized through new development versus maintaining the status quo.

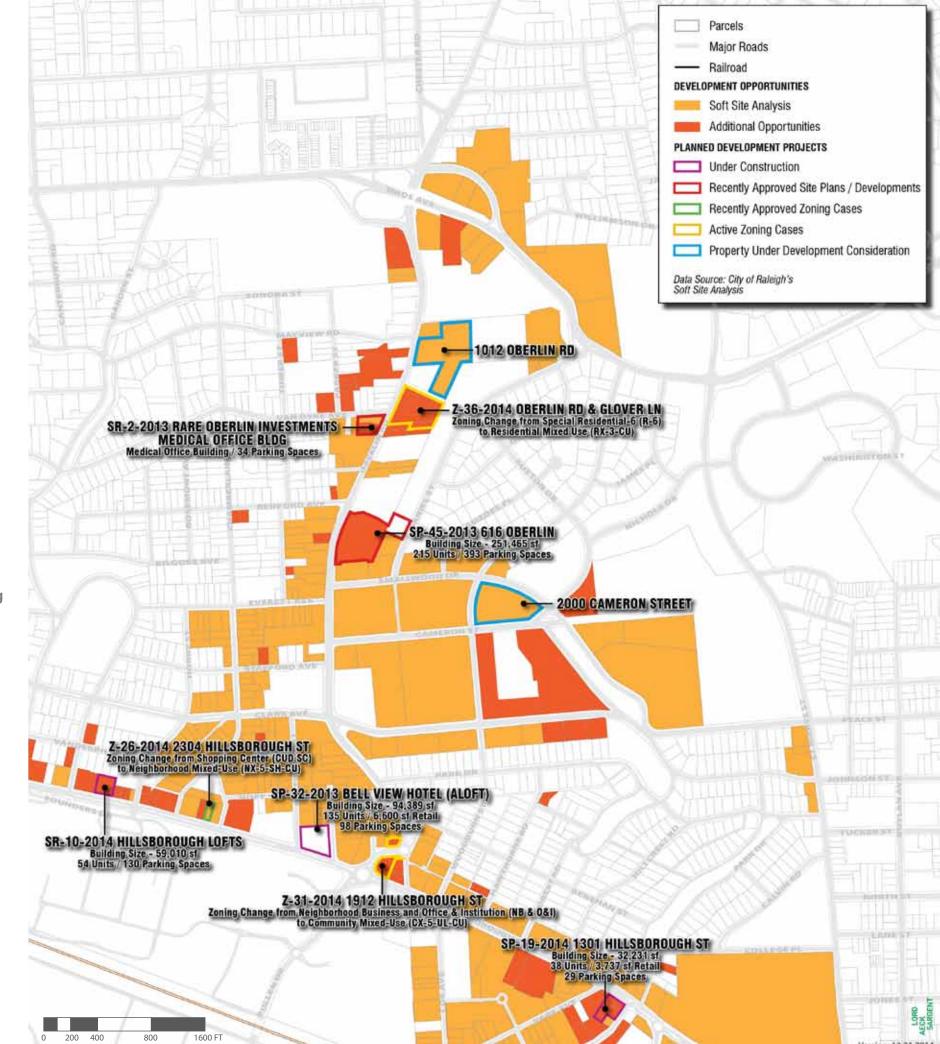
Soft sites include vacant sites, sites which are "under built," and sites with vacant or deteriorated structures. This Soft Site Analysis was a springboard to identify additional opportunities for development.

REDEVELOPMENT PRESSURE

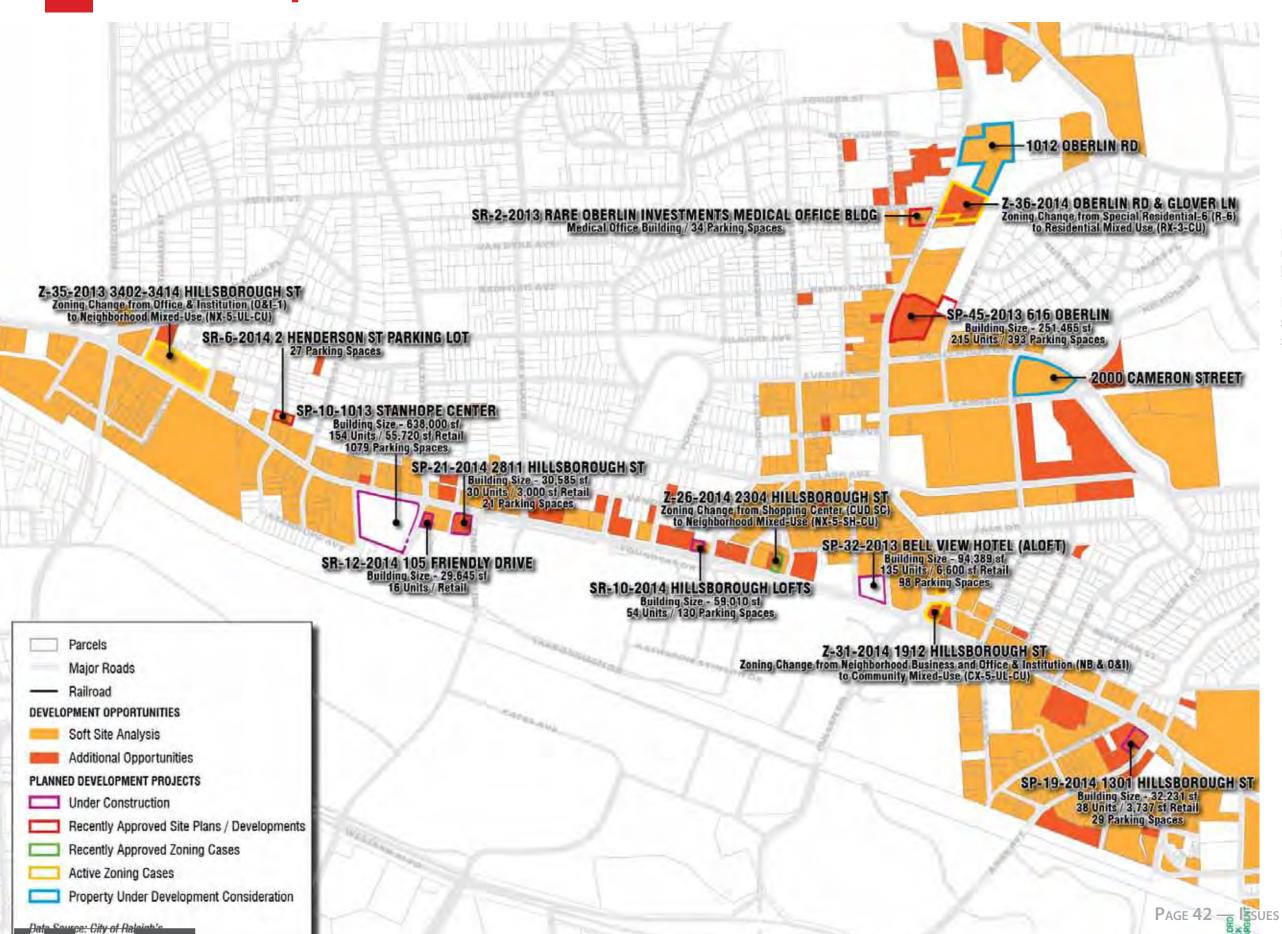
Some additional pressures for redevelopment come from residential infill of existing vacant properties within existing neighborhoods. Other pressures include property that could have higher and "better" uses along commercial/office corridors.

CAMERON VILLAGE

In addition to recent redevelopment, numerous sites in the study area are experiencing redevelopment pressures.



Redevelopment Pressure



HILLSBOROUGH STREET

Large portions of the corridor are not being used to their highest and "best" use and may be considered for redevelopment.

Parking is currently piecemeal throughout the study area and could be addressed in a more strategic fashion.

LORD



Mobility Analysis

REVIEW: Assessing Transportation, in Context

Acknowledging the unique characteristics of the study area is paramount to framing the performance of Cameron Village and Hillsborough Street. Unlike most transportation studies, where automobile capacity is a dominant force, what are considered alternative modes – walking, public transport, bicycling – are premier options for many people, even those who have access to or start off their day in automobiles. The context of the study area, and comments received from residents and steering committee members, suggested that the following issue areas can describe the system and point to areas of softness in the existing infrastructure:

It is important to consider that the performance in any one area has some impact on other measures: for example, lower delays for pedestrians crossing at a signal typically negatively impact the amount of time devoted to automobile crossings, hence raising the delays to those users. Also, these measures are not necessarily "hard," quantitative indicators, but are also tempered with the comments received from the public and field observations that take into account location-specific concerns that occur at a level of detail that typically escape broad-brush performance indicators.

Lighting and speed studies, as well as ample on-site investigation and public comments, helped to frame the discussion in terms of issue identification. Analytic measures taken included traditional automobile level-of-service studies, microsimulation (largely using data obtained from the City of Raleigh), and quality/level-of-service modeling (Q/LOS). While parking conditions were a consideration in both parts of the study area, the Cameron Village districts received additional attention to a broader array of multimodal performance issues.

ISSUE AREA	USERS IMPACTED = Primary / = Secondary			
	AUTO	WALK	BIKE	TRANSIT
Parking Quantity and Management/ Restrictions	•			
Delay at Intersections*				•
Crash Volumes*		•		
Frequency of Bus Service*				•
Quality of Stop Amenities*				•
Barrier Assessment*		•		•
Pedestrian and Bicycling Infrastructure Extent, Connectivity and Condition*		•	•	
Design*				
*Conducted only for the area surrounding t	he Cameron Villa	ge Shopping Center,	Oberlin Avenue, d	and Clark Avenue



Tansportation Improvements

SIDEWALK / STREETSCAPE IMPROVEMENT PROJECTS

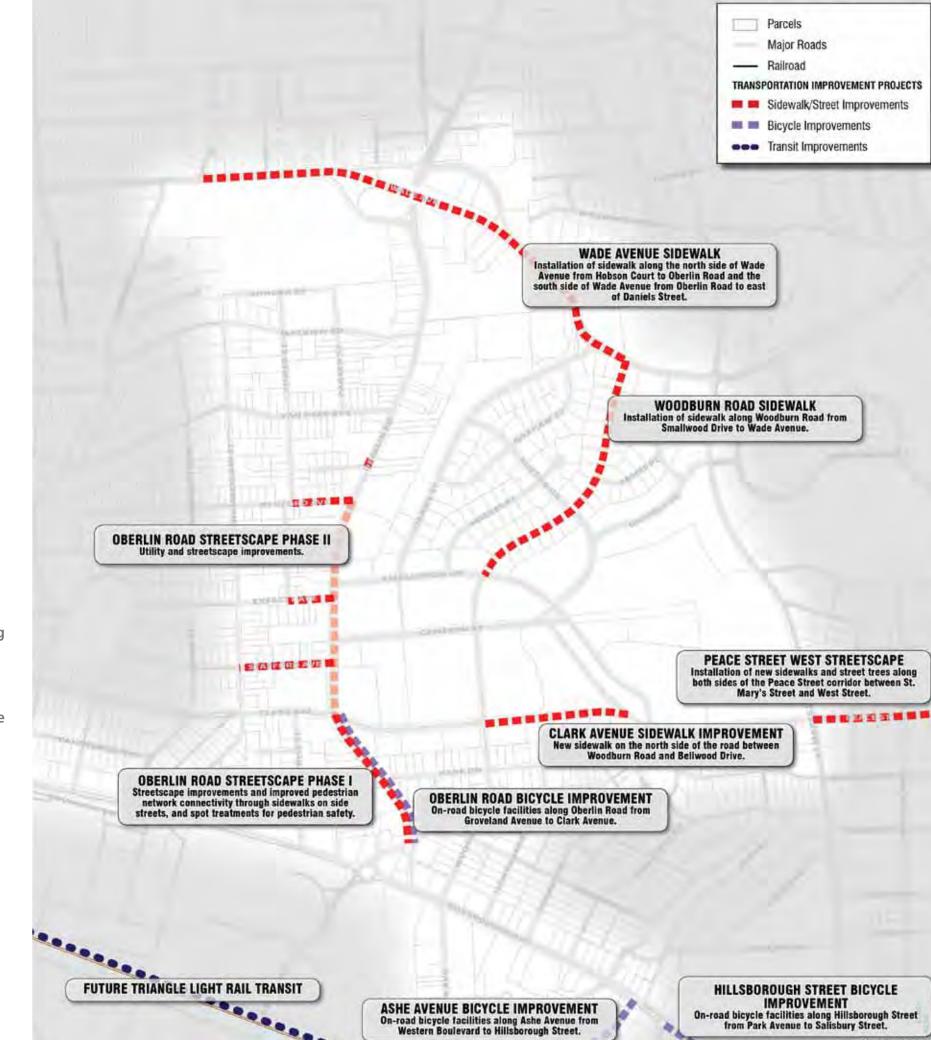
There are several sidewalk and streetscape improvement projects currently underway or about to kick off within or just adjacent to the study area:

- Wade Avenue Sidewalk Installation installation of sidewalk along the north side of Wade Avenue from Hobson Court to Oberlin Road and the south side of Wade Avenue from Oberlin Road to east of Daniels Street
- Woodburn Road Sidewalk Installation installation of sidewalk along Woodburn Road from Smallwood Drive to Wade Avenue
- Oberlin Road Streetscape Phase I streetscape improvements and improved pedestrian network connectivity through sidewalks on side streets, and spot treatments for pedestrian safety
- Oberlin Road Streetscape Phase II utility and streetscape improvements
- Clark Avenue Sidewalk Installation New sidewalk on the north side of the road between Woodburn Road and Bellwood Drive
- Peace Street West Streetscape installation of new sidewalks and street trees along both sides of the Peace Street corridor between St. Mary's Street and West Street

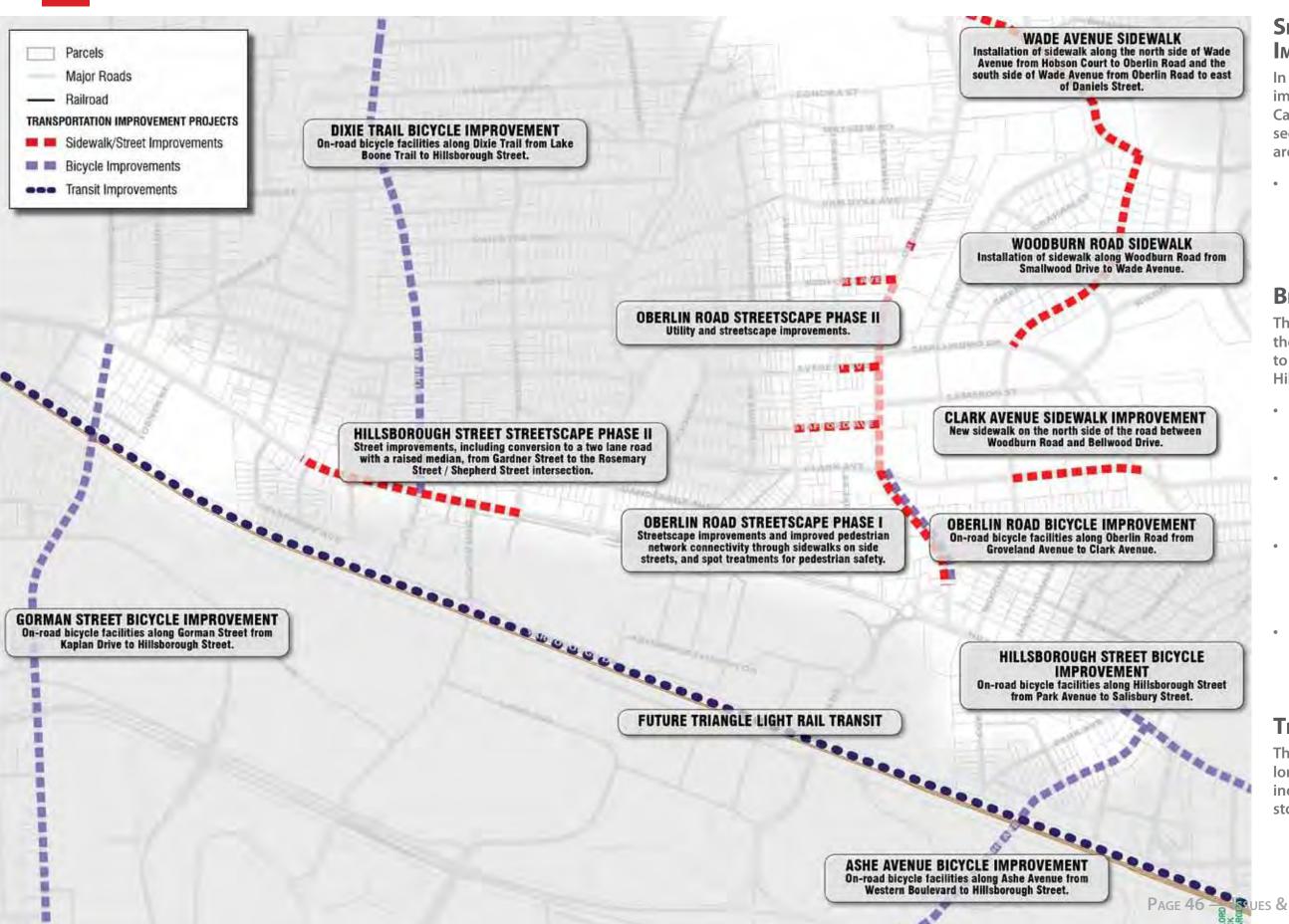
BICYCLE IMPROVEMENT PROJECTS.

There is one bicycle improvement project in the works for the study area and two more to the south, and more closely related to the Hillsborough Street study area:

 Oberlin Road Bicycle Improvement – on-road bicycle facilities along Oberlin Road from Groveland Avenue to Clark Avenue



I ransportation Improvements



SIDEWALK / STREETSCAPE IMPROVEMENT PROJECTS

In addition to the sidewalk and streetscape improvement projects shown within the Cameron Village study area there is one seeking Council approval within the study area:

Hillsborough Street Streetscape Phase II – street improvements, including conversion to a two lane road with a raised median, from Gardner Street to the Rosemary Street / Shepherd Street intersection

BICYCLE IMPROVEMENT PROJECTS.

There is one bicycle improvement project in the works for the study area and two more to the south, and more closely related to the Hillsborough Street:

- Dixie Trail Bicycle Improvement on-road bicycle facilities along Dixie Trail from Lake Boone Trail to Hillsborough Street
- Gorman Street Bicycle Improvement onroad bicycle facilities along Gorman Street from Kaplan Drive to Hillsborough Street.
- Hillsborough Street Bicycle Improvement

 on-road bicycle facilities along

 Hillsborough Street from Park Avenue to

 Salisbury Street
- Ashe Avenue Bicycle Improvement onroad bicycle facilities along Ashe Avenue from Western Boulevard to Hillsborough Street.

TRANSIT IMPROVEMENT PROJECTS.

The Future Triangle Light Rail Transit is on a longer schedule, but is slated to potentially include one, or possibly two light rail transit stops.

LUKU AECK SARGEN

Iraffic Operations

From its earliest days as a relief valve to congested downtown shopping in the 1940's and 1950's, Cameron Village's transportation system has been shaped by a prominent grid system and connectivity to major surface streets at the periphery - Wade Avenue, Peace Street, and Hillsborough Street. The strength of this grid system is evident in the way that it moves traffic in and through the area, and the degree of resiliency it provides in the event of a lane closure due to crashes, construction, or events (e.g., charity runs or bike rides). Although all of the streets are two- or three-lane (two lanes and a center turning lane) streets, observations taken at major intersections indicate that traffic performance is quite high even though some of the major, internal arteries (Clark Avenue, Oberlin Road) are operating within 75% to 90% of their typical capacity. Highly interconnected street

systems carry vehicles more efficiently because of the "redundancy" inherent in the network: if one street becomes congested or a crash is perceived ahead, then the user has the choice of turning off to a side street and

take an alternative route.

INTERSECTIONS

The benefits become even more apparent when the intersection performance – the more important indicator in urbanized areas - is examined. In no case are intersections operating below a "C" level-of-service (LOS is an A-through-F scale based on average delays to cars, in this discussion); all signalized intersections around the Cameron Village Shopping Center are working at an "A" or "B" except Oberlin-Clark ("C"). Locating intersections in busy parts of Raleigh that operate better than a LOS of "D" is actually quite difficult – the efforts of traffic engineers as well as the inherent benefits of a wellconnected street system are the main benefactors.







Traffic Operations



MOBILITY

The thickness of the red lines in this map and the previous one indicate the Average Daily Trips that were accounted for along segments of the main corridors through the study area. The thicker the line the more vehicles per day on that segment.

One of the most interesting things about this is understanding how cross streets are greatly impacting the overall system. For instance, it becomes obvious that there must be a large number of cars that are finding alternate routes between Smallwood and Clark Avenue on Oberlin Street. It is also interesting to see how vehicles are feeding onto Hillsborough as it gets closer to the Beltline.

Version: 12.05.2014

Bicycle Facilities

BICYCLE AMENITIES

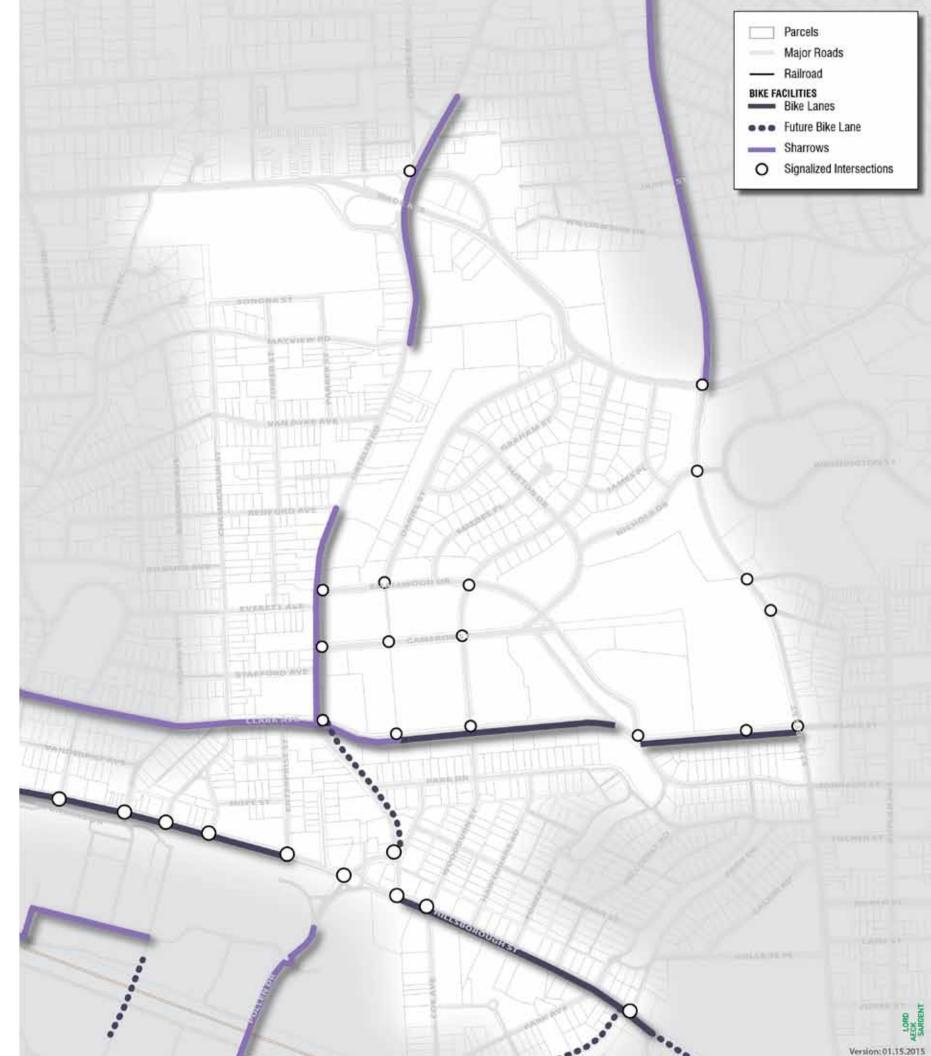
There are limited bike facilities or connections to or across the site. The connections along Hillsborough and Clark Avenue and Peace Street are close to creating a strong east-west network, but the north-south connections either along Oberlin or St. Marys are still lacking. Most bike facilities that do exist are sharrows.

DESIGN DEFICIENCIES

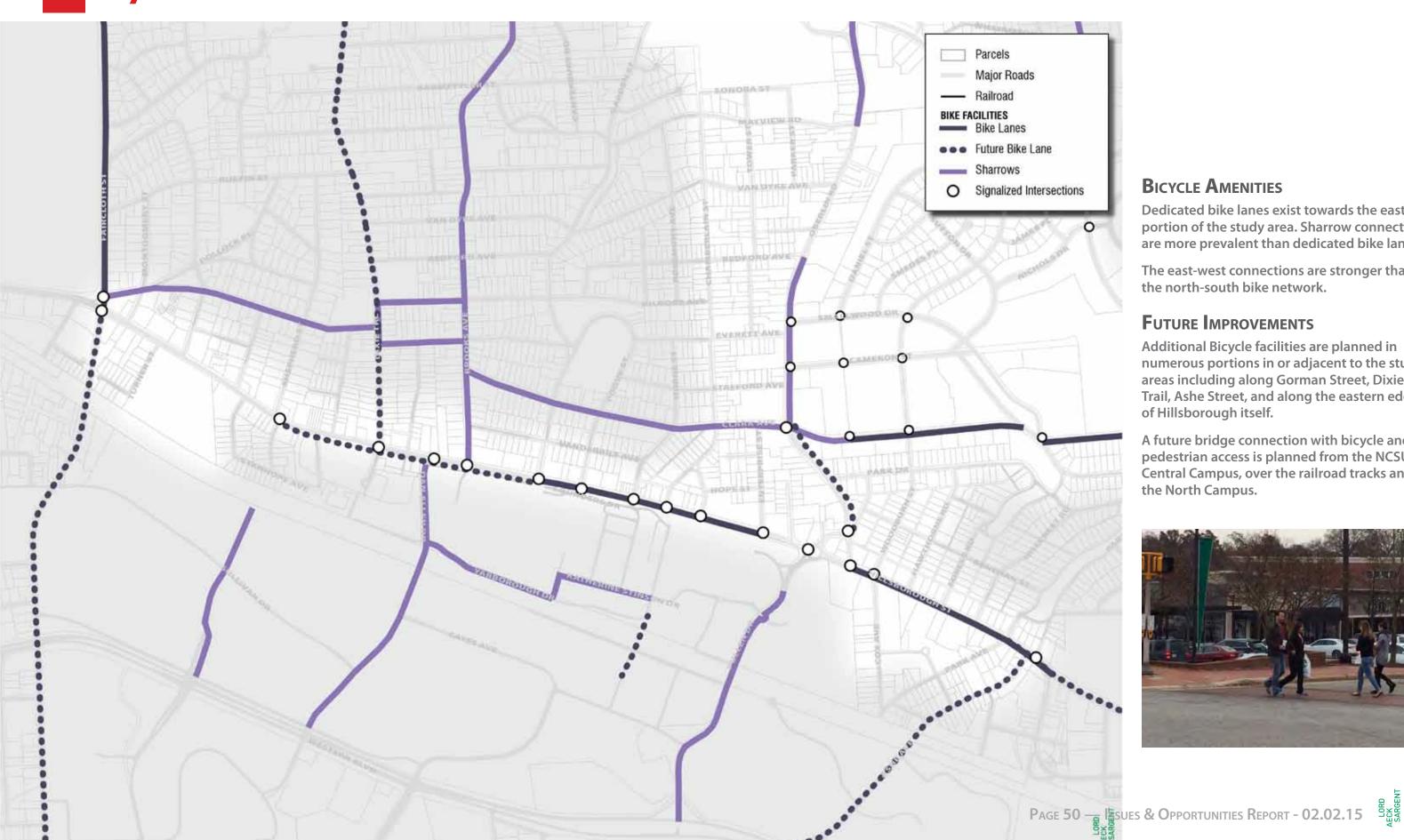
- Shade trees/bike boxes/ lighting/on-road provisions/bike racks/ lockers/fountains
- Better signage/better markings
- Limited on-streets bike provisions
- Bike Parking/lockers
- Bike boxes/bike actuation
- Bike priority at intersections







Bicycle Facilities



BICYCLE AMENITIES

Dedicated bike lanes exist towards the eastern portion of the study area. Sharrow connections are more prevalent than dedicated bike lanes.

The east-west connections are stronger than the north-south bike network.

FUTURE **I**MPROVEMENTS

Additional Bicycle facilities are planned in numerous portions in or adjacent to the study areas including along Gorman Street, Dixie Trail, Ashe Street, and along the eastern edge of Hillsborough itself.

A future bridge connection with bicycle and pedestrian access is planned from the NCSU Central Campus, over the railroad tracks and to the North Campus.



Version: 01.16.2015

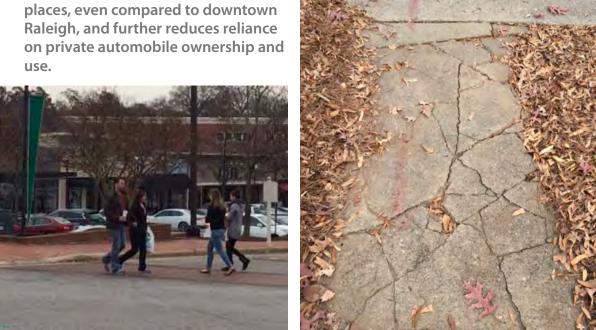
edestrian Facilities

PEDESTRIAN AMENITIES

By almost any measure, both Cameron Village and Hillsborough Street have tremendous walkability; mixtures of complimentary uses in close proximity, continuous lengths of sidewalk, slower vehicular speeds, and a growing network of

bicycle facilities are making this area a destination for cyclists and those who wish to make walking to shops, workplaces, and back home a priority. Almost any person visiting the area is going to walk more than they would at their destination in other parts of the City, simply due to the design of the place and location of parking relative to the diverse uses. Walking in Cameron Village and Hillsborough Street has become the norm, not an alternative. The nearby availability of two major grocery chains makes this area unique among the most walkable places, even compared to downtown Raleigh, and further reduces reliance









edestrian Facilities



DESIGN DEFICIENCIES

The project team's investigations indicated that there are pockets of lower maintenance and lighting levels that could be improved, and specific places where crossing treatments, missing segments of sidewalks, or lack of buffering between automobile traffic might be added. Importantly, public and Advisory Committee comments have noted the lack of perceived connectivity between the two main parts of the study area, Hillsborough Street and Cameron Village. Although within close proximity – about three blocks – some of the connections are not articulated with wayfinding signage, consistent bike/walk facilities, or streetscape elements. A premier example is Enterprise Street, which connects the corner of a Cameron Village district with the heart of the Hillsborough Street corridor. **Enterprise Street would benefit from better** walking/biking provisions, pedestrianlevel lighting, and improved maintenance - additional design elements dedicated to opportunistically increasing open space could make this a centerpiece connecting the two venues. Wayfinding could also be employed to improve connectivity to existing parks and cultural opportunities like the Raleigh Little Theater. Finally, better connections to downtown from both Hillsborough Street (which is going to get a major boost from the addition of bicycle lanes in the vicinity of Glenwood Avenue) and Cameron Village would increase the visibility of both areas as accessible by foot and especially bicycling. Even in areas where the grid system is interrupted, new pathways can be created relatively easily or existing ones improved. A barrier assessment was completed for the study area, indicating some substantial difficulties such as navigating through the northern part of Oberlin Road to the main retail concentration of historical Cameron Village.

Version: 01.15.2015

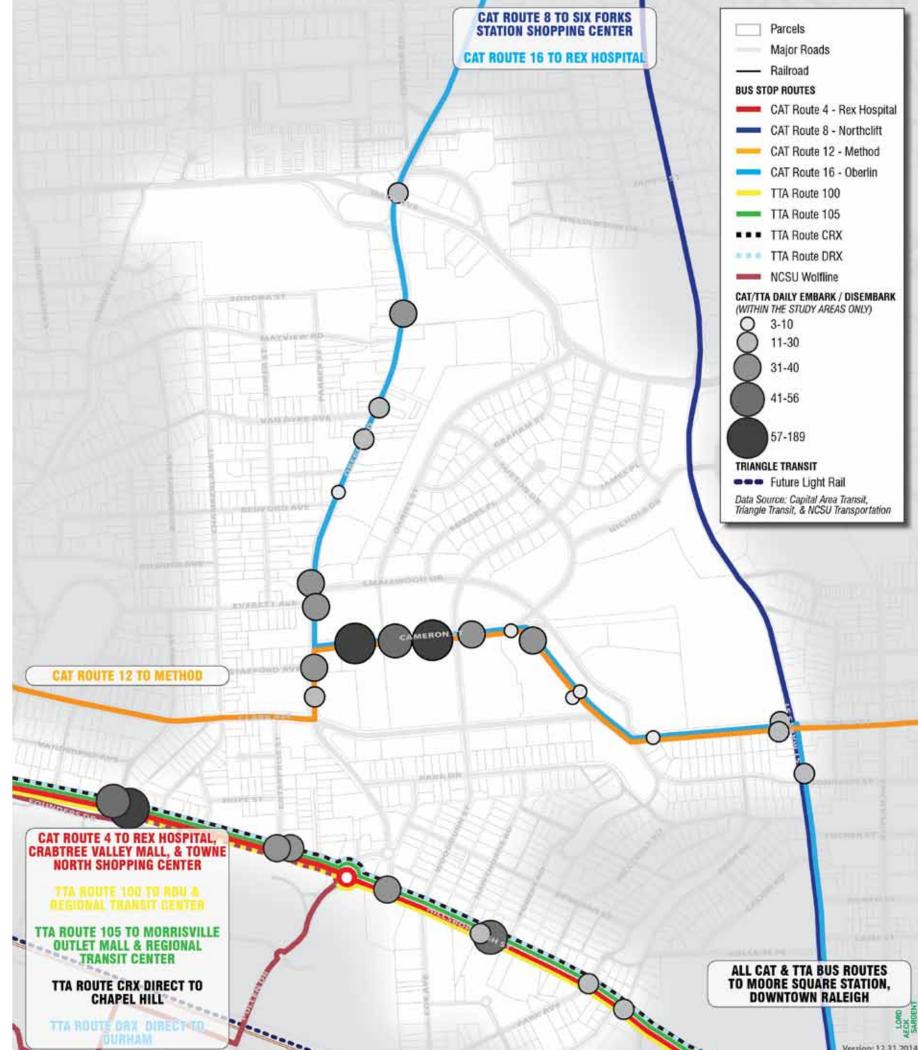
Transit Analysis

Public Transportation

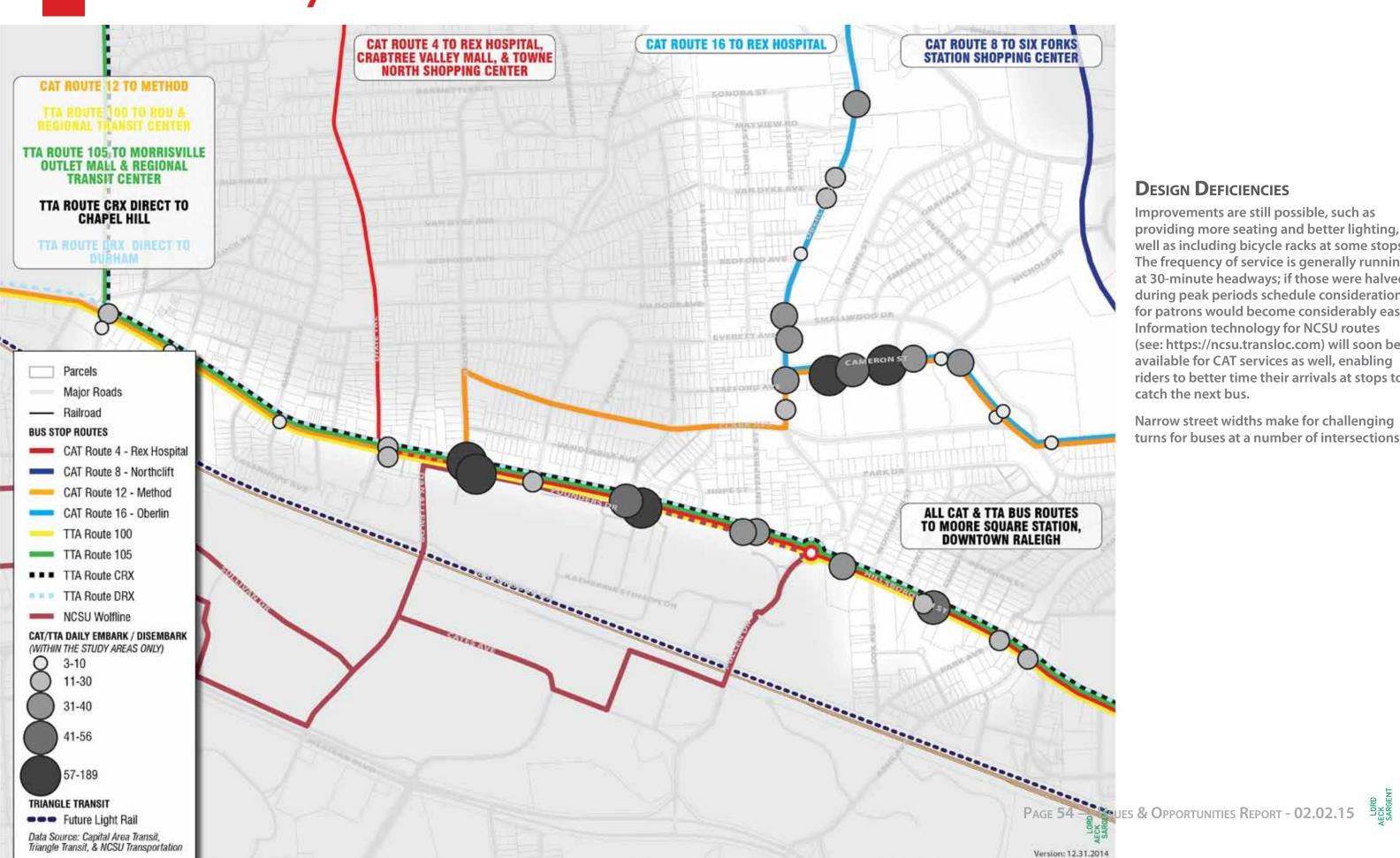
Like the other modes listed, there is relatively ample public transportation service throughout the study area (or within a ½-mile of one or more existing bus routes). Both the University and the City provide multiple routes in the study area, notably

the Method (No. 12) CAT route; and Hillsborough Street Shuttle (NCSU), Westgrove (No. 4), and Carter Finley (No. 6) NCSU routes. The provisions at bus stops, particularly in Cameron Village are quite good, featuring covered shelters for patrons. However, additional thought should be given to direct connections between the study area, NCSU, and the downtown core.





I ransit Analysis



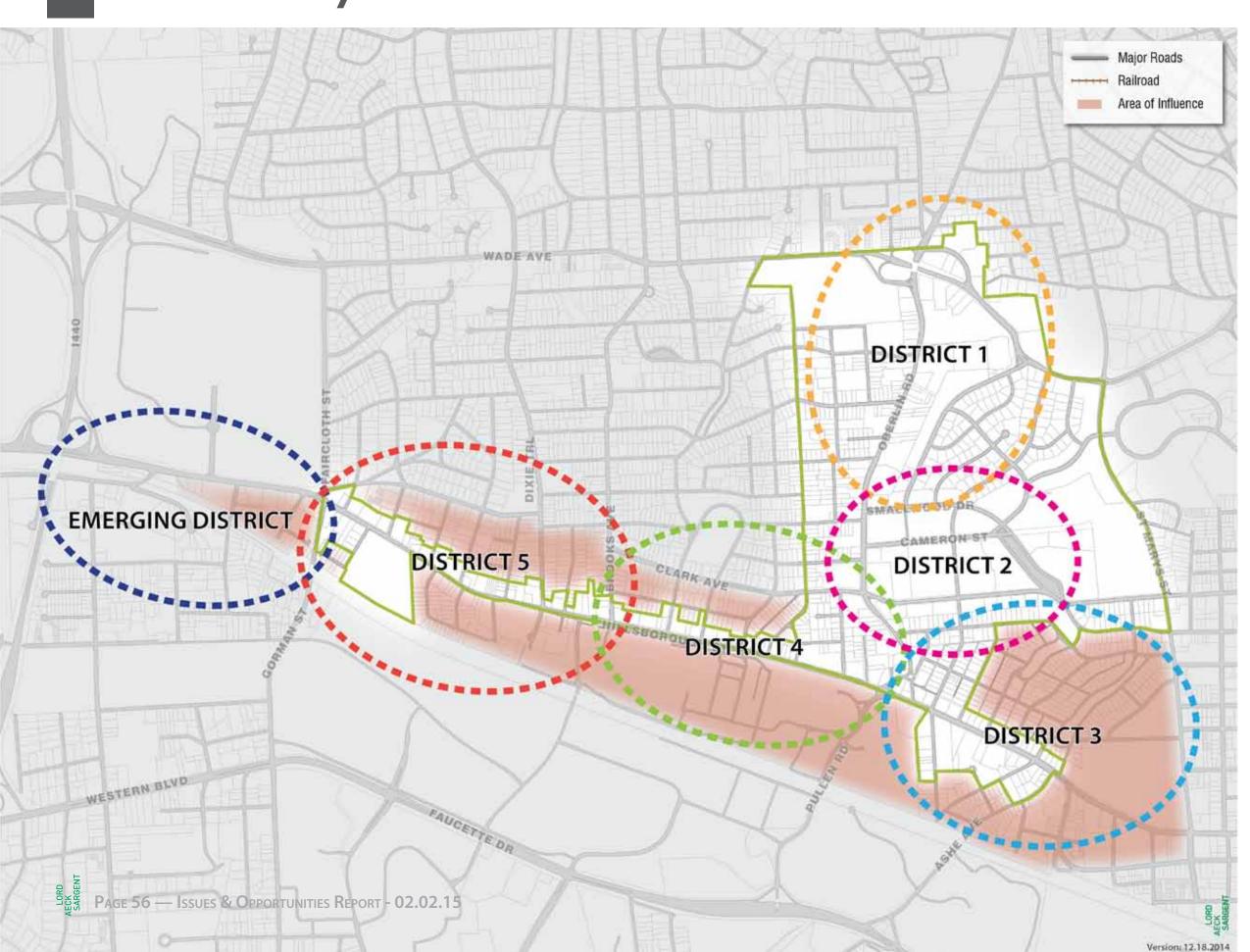
DESIGN DEFICIENCIES

Improvements are still possible, such as providing more seating and better lighting, as well as including bicycle racks at some stops. The frequency of service is generally running at 30-minute headways; if those were halved during peak periods schedule considerations for patrons would become considerably easier. Information technology for NCSU routes (see: https://ncsu.transloc.com) will soon be available for CAT services as well, enabling riders to better time their arrivals at stops to catch the next bus.

Narrow street widths make for challenging turns for buses at a number of intersections,.



District Analysis



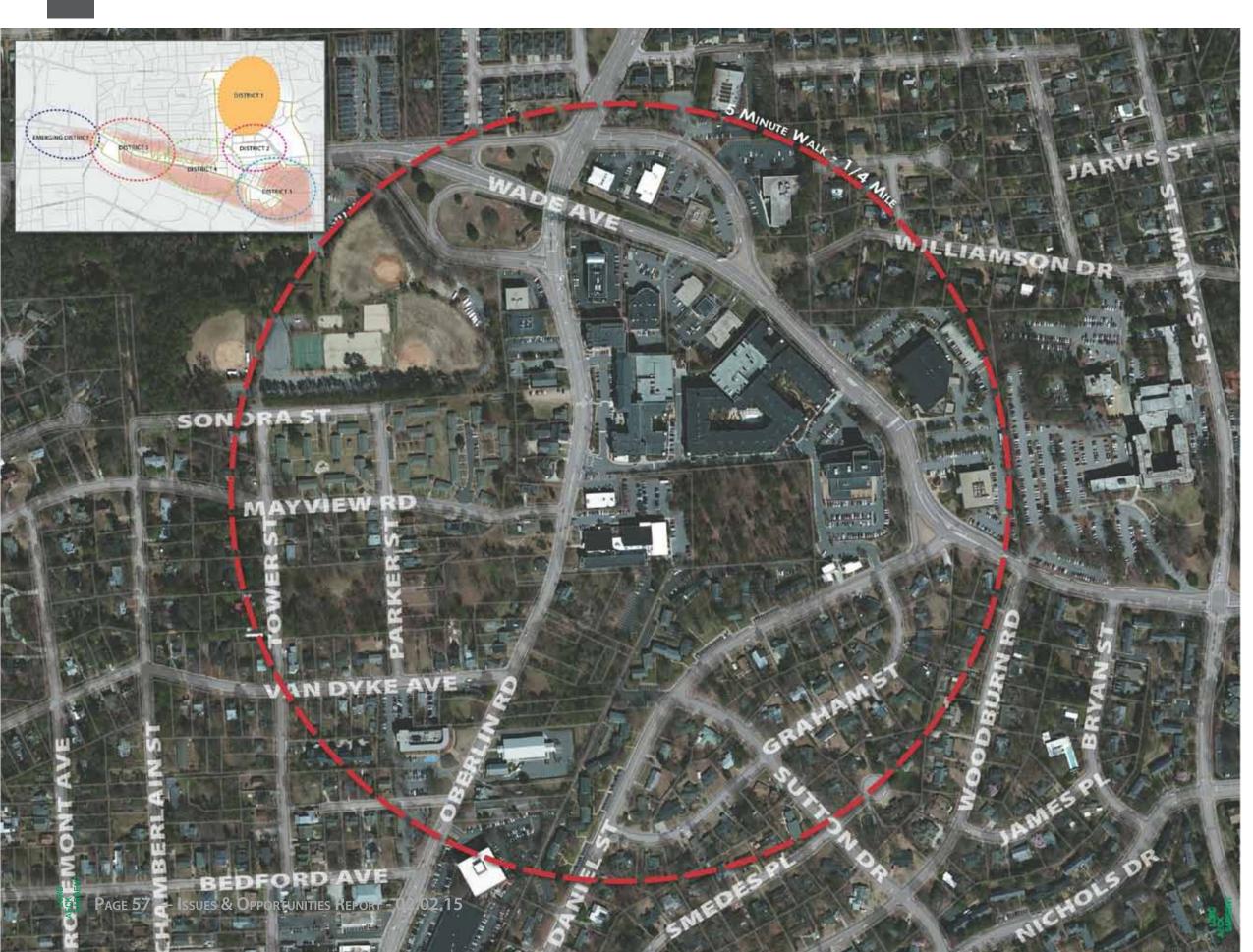
SIX DISTRICTS

Given the large area of study, it is helpful to examine planning issues at the district scale. This allows a more granular consideration of existing conditions and future potential.

A series of maps is included for each district:

- aerial photo
- parking assessment
- development opportunities & planned projects
- Change/No-Change input from December 9, 2014 public meeting

District 1



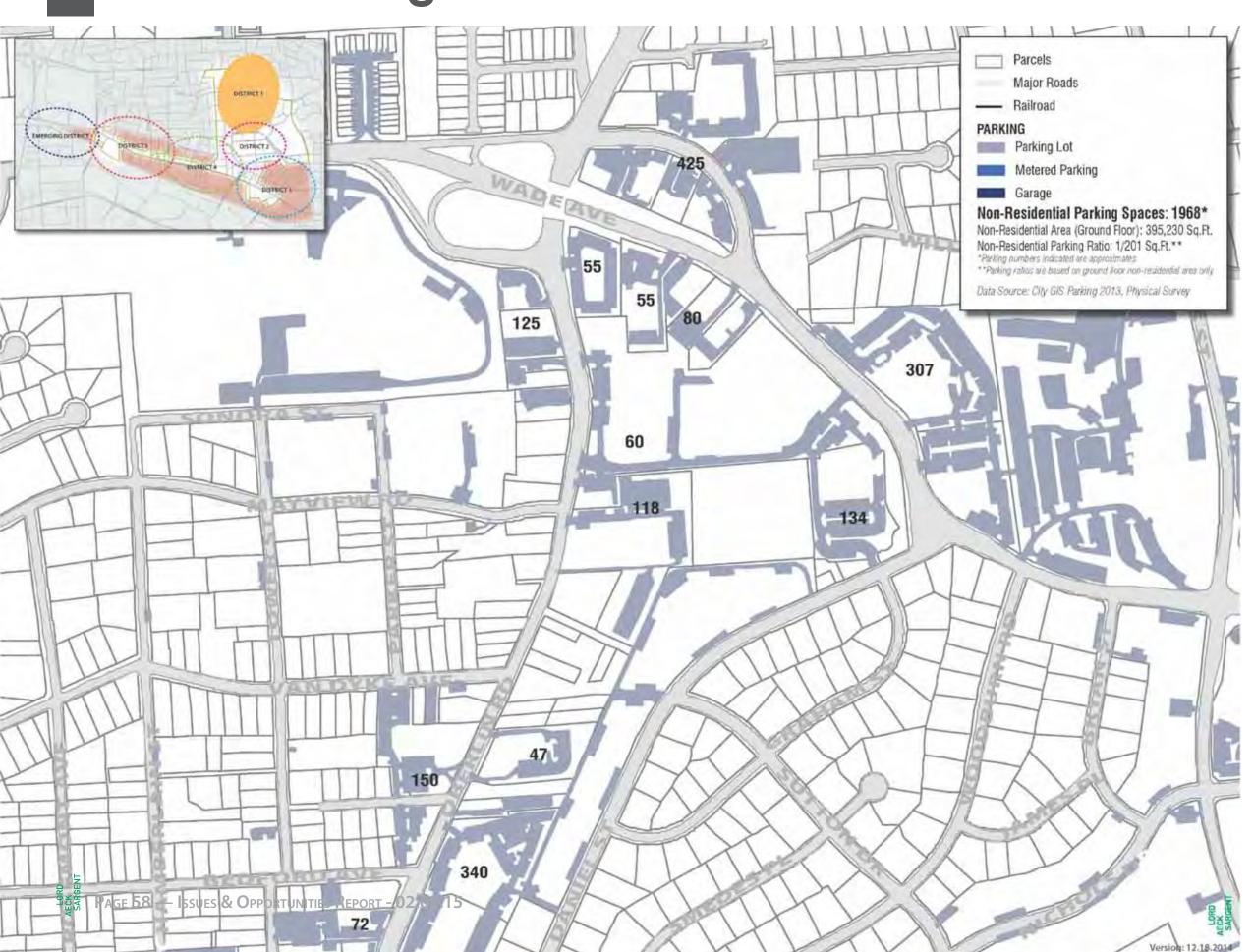
Issues:

- Preservation of historic Oberlin Village
- Affordability
- Width of Oberlin Road to accommodate traffic and all modes

URBAN DESIGN:

- Lack of pedestrian-scaled blocks
- Daniels Street as secondary ped/bike spine
- Potential Sutton Extension
- Character and speed on Wade Avenue

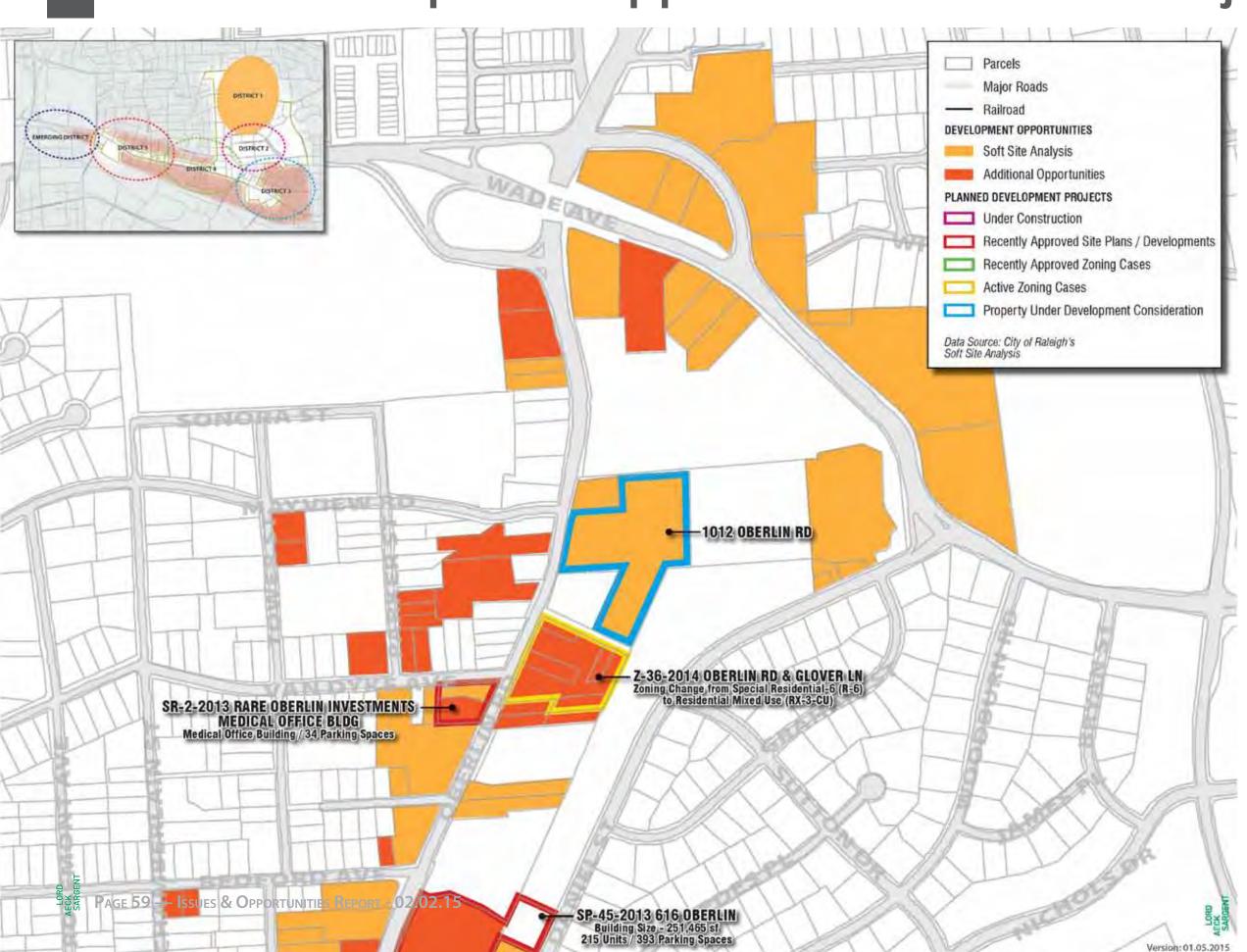
District 1 Parking Assessment



DISTRICT 1

- 1968 Non-Residential Parking Spaces
- 1 Parking Space / 201sf
- * Parking Numbers Are Approximate

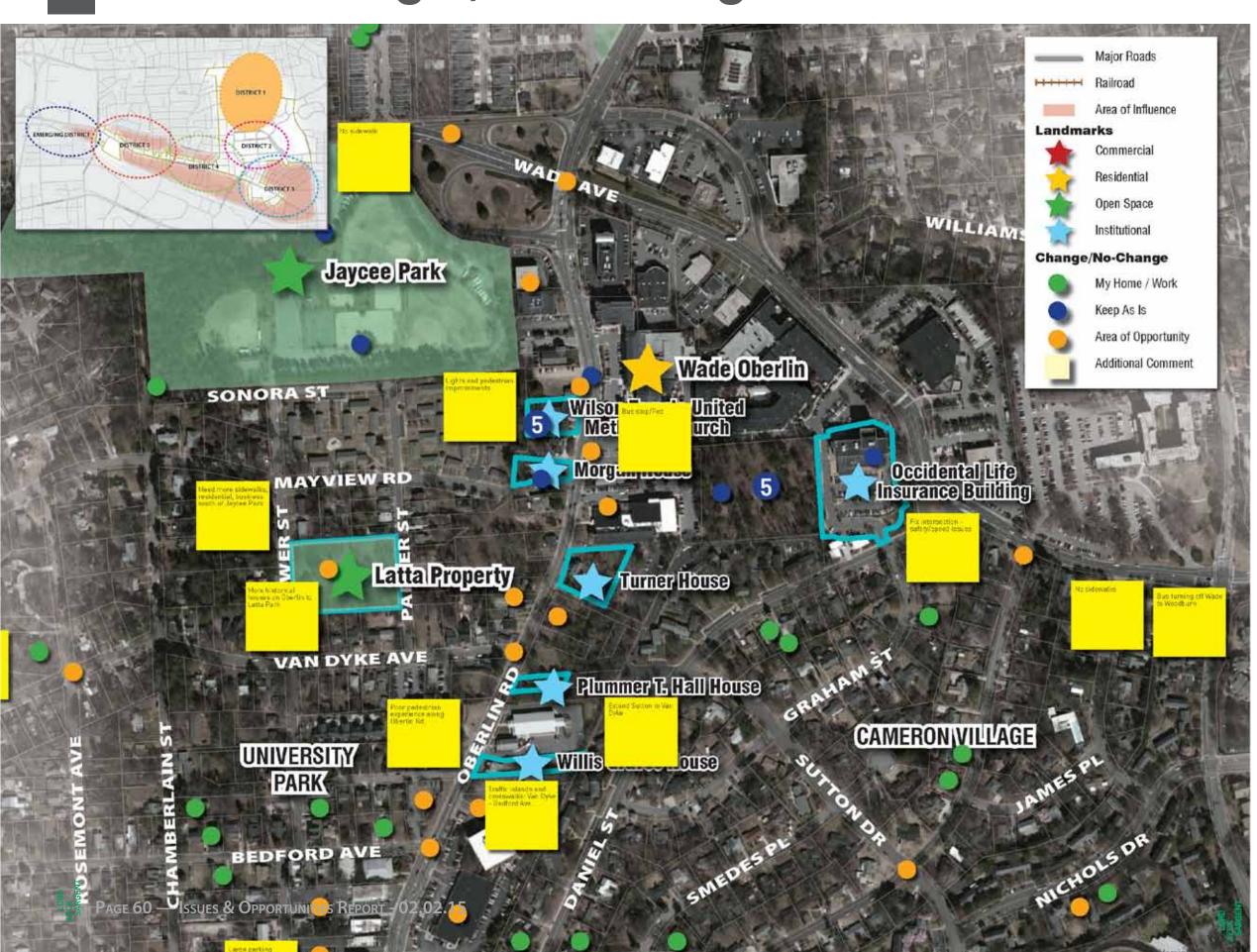
District 1 Development Opportunities & Planned Projects



PLANNED PROJECTS

- Proposed Medical Office Building
- Zoning Change from Special Residential to Mixed-Use
- Property along Oberlin Under Consideration for Development

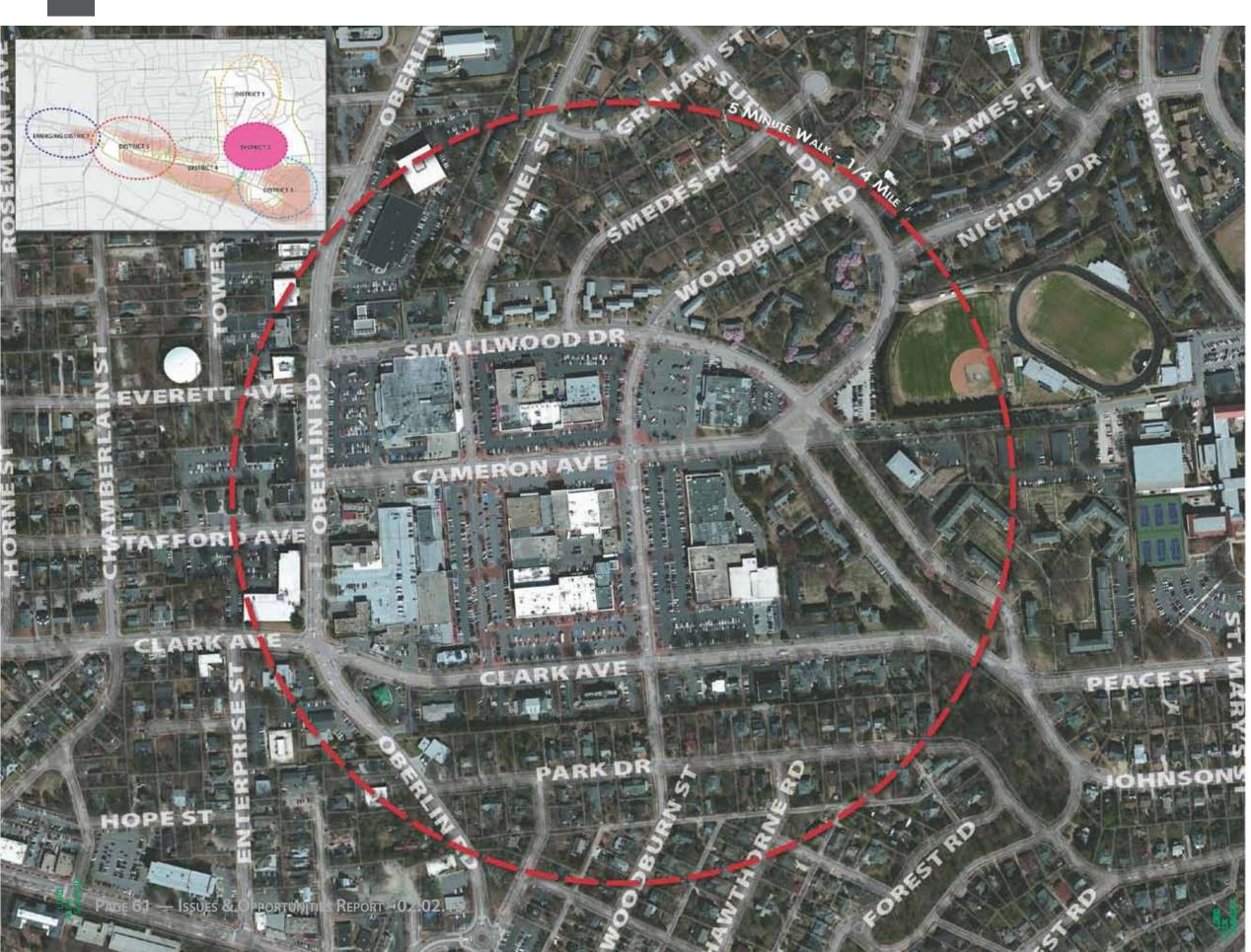
District 1 Change / No-Change Exercise



SUMMARY OF PUBLIC COMMENTS

- Pedestrian improvements throughout
- Potential connection from Sutton to Van Dyke
- Sidewalks along Wade Ave.
- More sidewalks, residences and businesses south of Jaycee Park
- Lights and pedestrian improvements south of Jaycee Park
- Bus stop/pedestrian improvements on north Oberlin Road
- Consider historic context of Oberlin Road
- Poor pedestrian experience along
 Oberlin Road
- Call for traffic islands and crosswalks along Van Dyke - Bedford Ave.
- Bus turning off Wade Ave. to Woodburn
- Fix intersection on Wade Ave. and Daniel - safety/speed issues

District 2



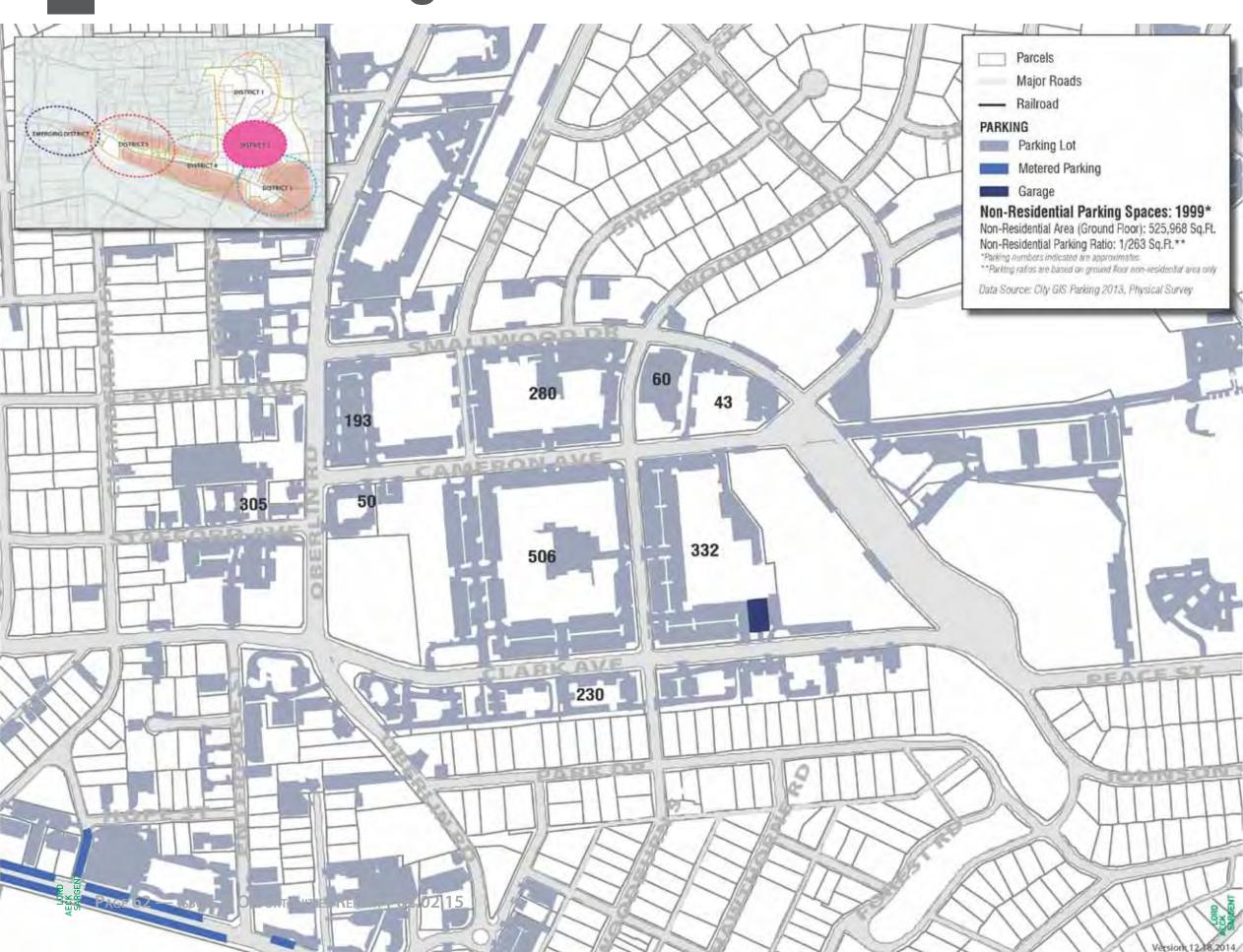
Issues:

- Existing parking maxed out
- Lack of pedestrian character on many streets
- Increased street lighting
- Age and condition of multi-family

URBAN DESIGN:

- Potential redevelopment along Clark Avenue and needed transitions
- Streets that need more pedestrian-oriented character
- Pedestrian safety/crosswalk improvement needed
- Smallwood/Bellwood intersection on east side
- Daniel or Woodburn as secondary ped/bike spine

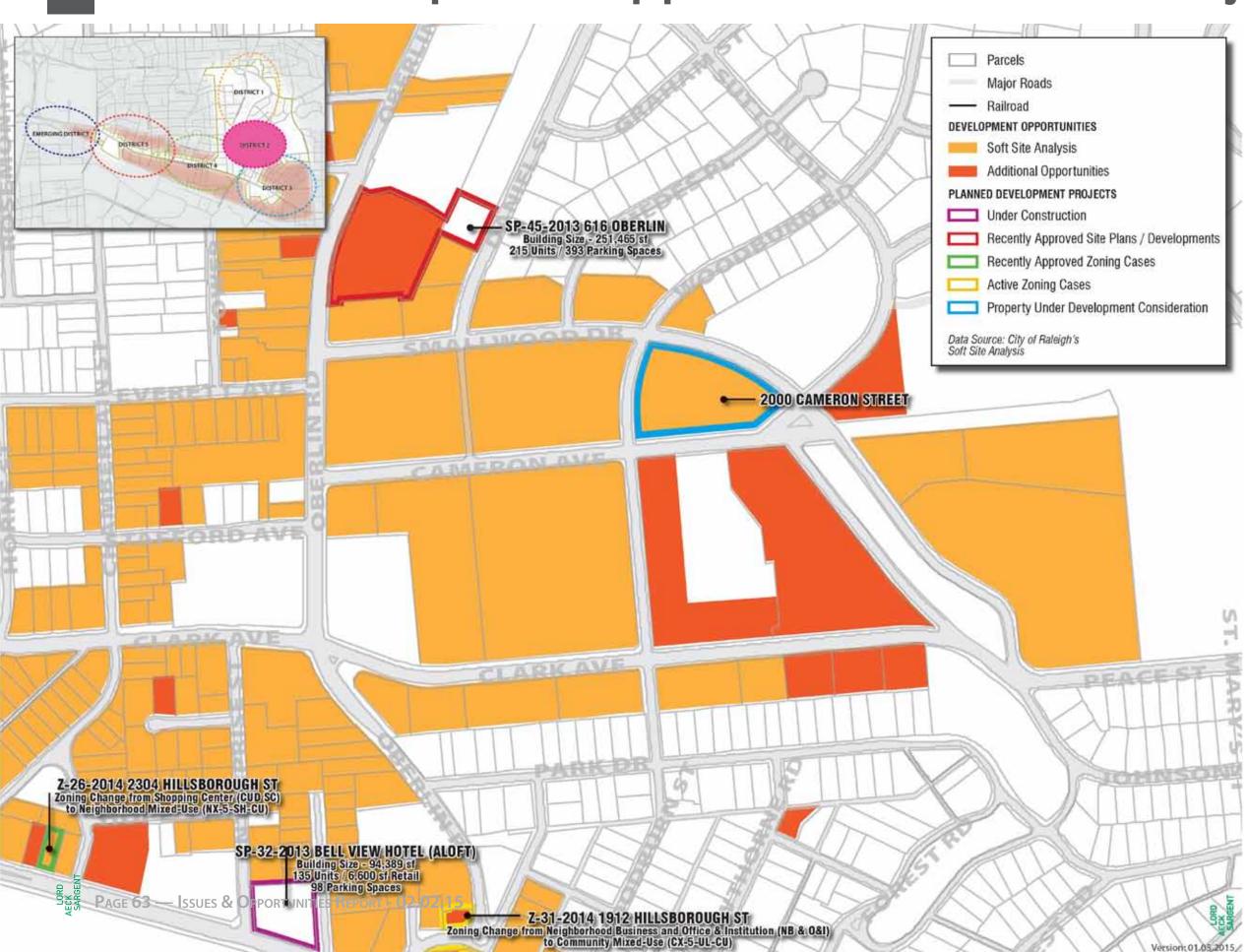
District 2 Parking Assessment



DISTRICT 2

- 1999 Non-Residential Parking Spaces
- 1 Parking Space / 263sf
- * Parking Numbers Are Approximate

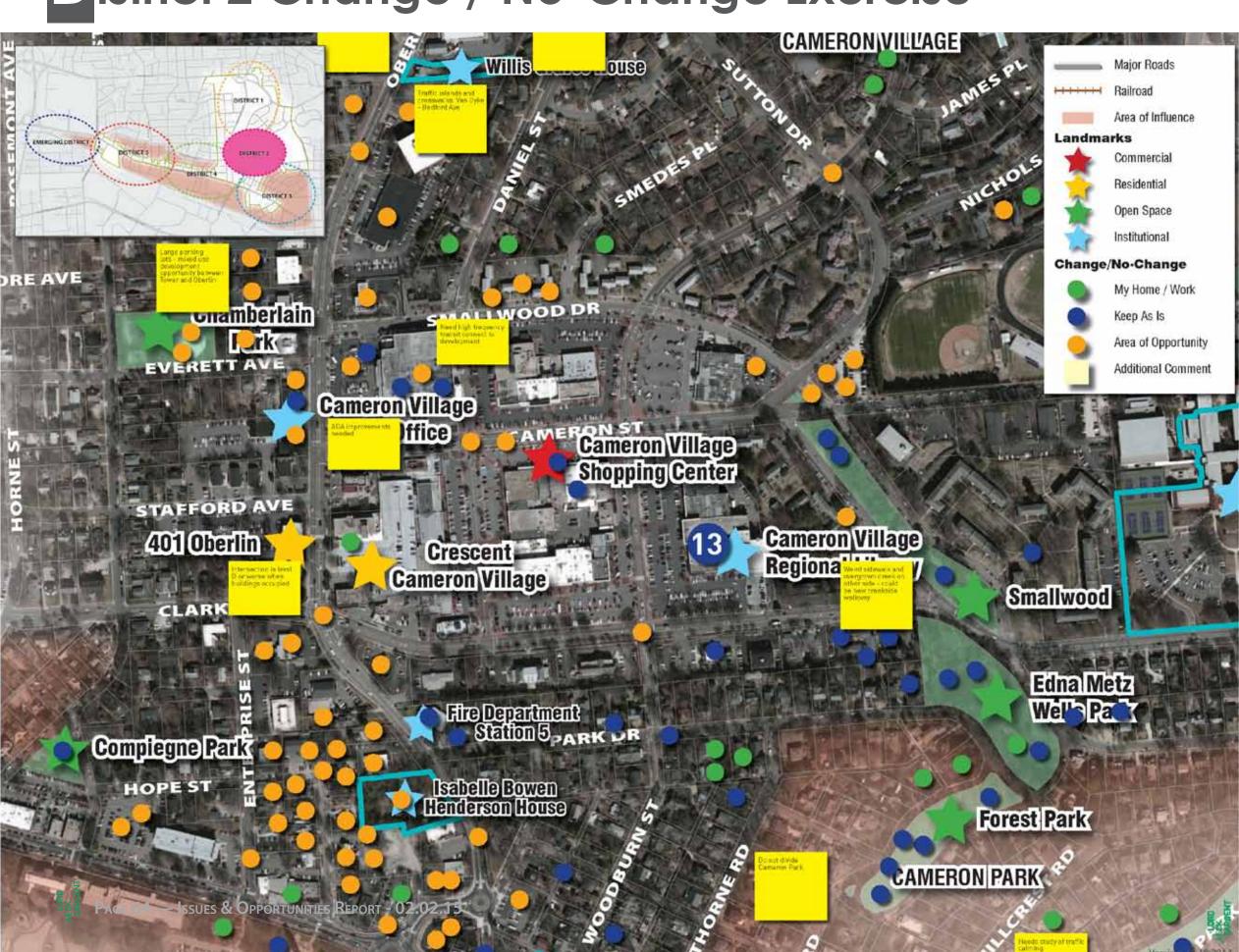
District 2 Development Opportunities & Planned Projects



PLANNED PROJECTS

- Mixed-Use Along Oberlin
- Property in Cameron Village Shopping Center Under Consideration for Development

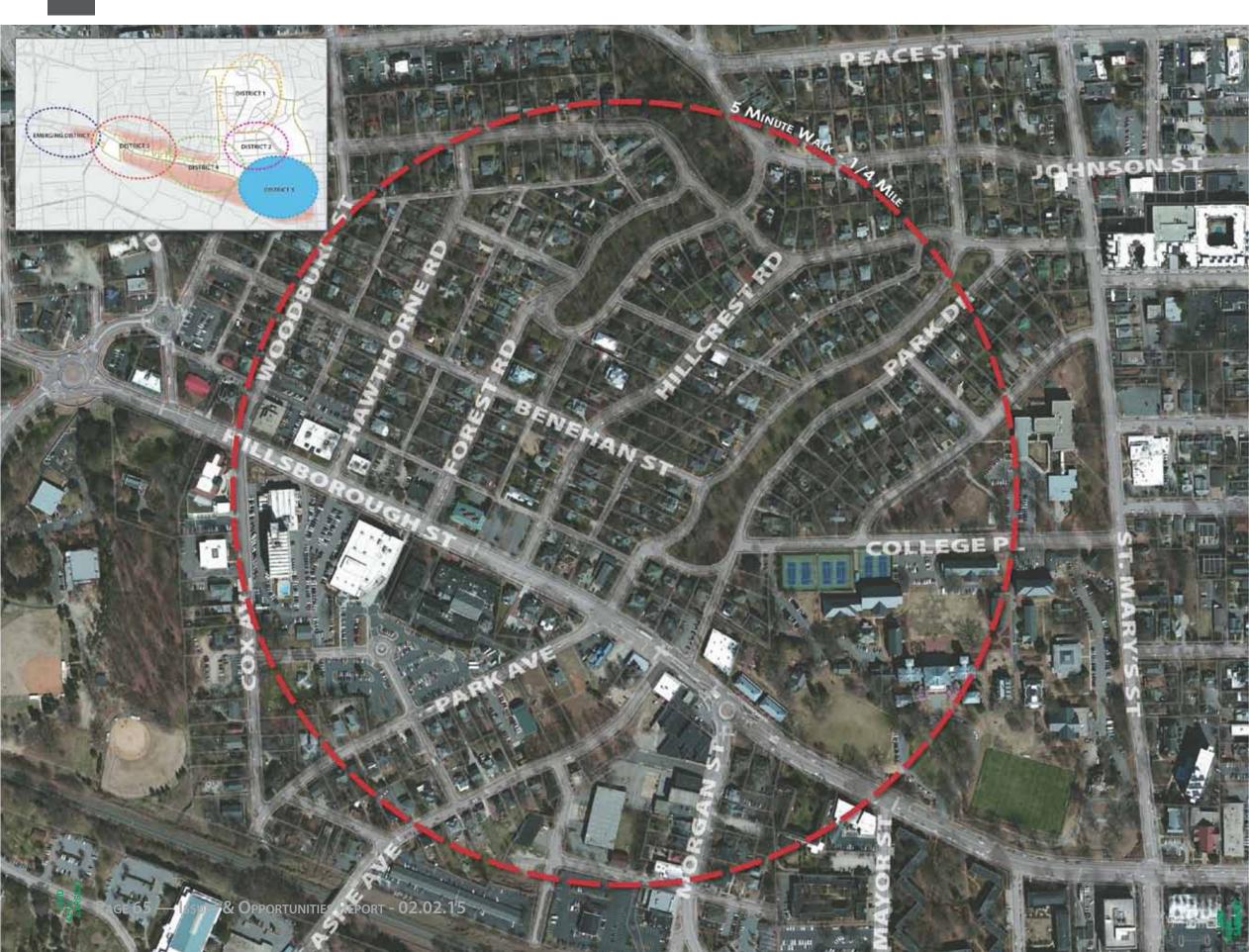
District 2 Change / No-Change Exercise



SUMMARY OF PUBLIC COMMENTS

- Numerous areas of opportunity marked between Enterprise and Oberlin
- Preservation of properties within Cameron Park, Cameron Village Library and Shopping Center
- Mixed-use development opportunity between Tower and Oberlin - large parking lots
- Need high frequency transit to connect to development
- ADA improvements
- Intersection improvement on Clark and Oberlin
- Potential for creekside walkway along northern side of Clark Ave.
- Traffic calming study in and around Cameron Park

District 3



Issues:

- Issues: Major institutions of schools, churches and YMCA
- Traffic on Residential Streets in Cameron Park
- Impact on St. Mary's Street, including Glenwood South

URBAN DESIGN:

- Leveraging Pullen Park amenities
- Redevelopment of aging buildings around YMCA

District 3 Parking Assessment



DISTRICT 3

- 1117 Non-Residential Parking Spaces
- 1 Parking Space / 202sf
- * Parking Numbers Are Approximate

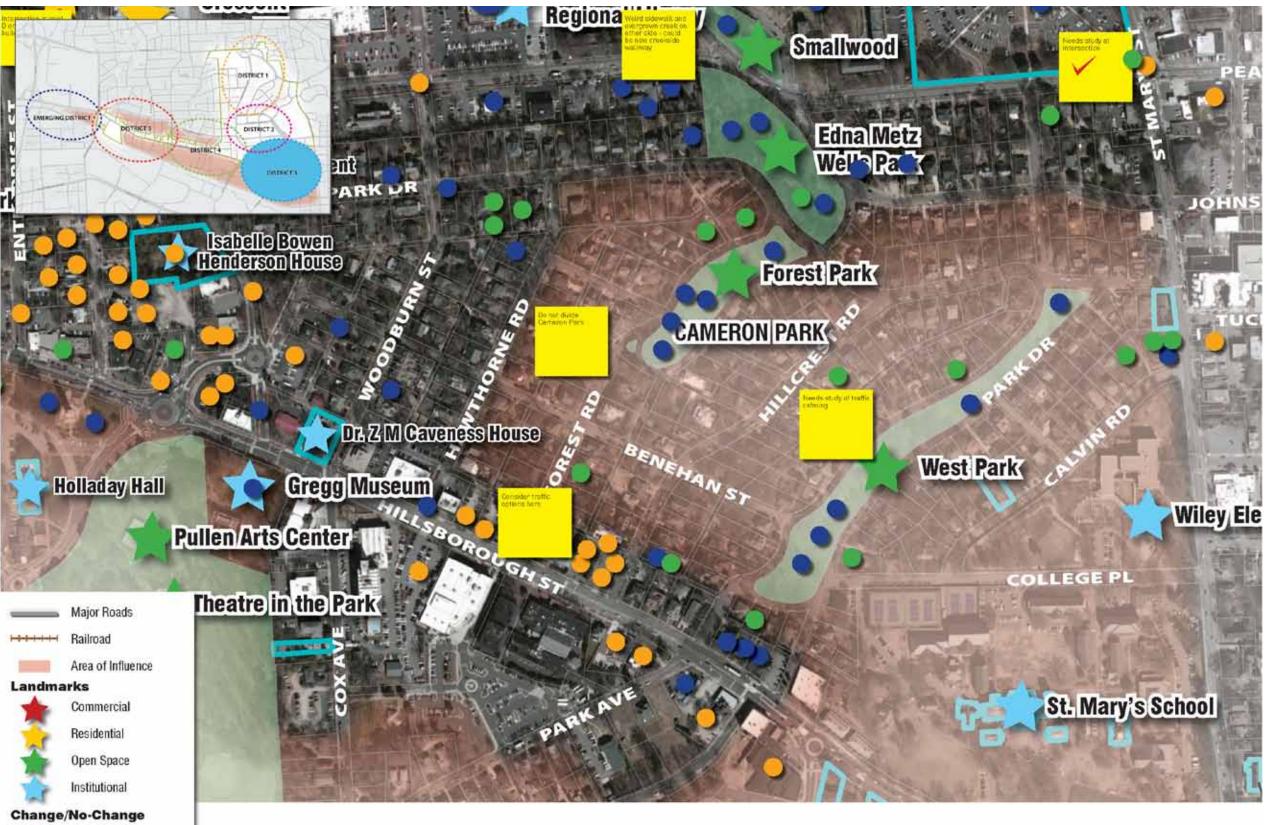
District 3 Development Opportunities & Planned Projects



PLANNED PROJECTS

- Zoning change to Mixed-Use
- Addition of Mixed Use Building along Hillsborough

District 3 Change / No-Change Exercise



SUMMARY OF PUBLIC COMMENTS

- Preservation of properties within Cameron Park
- Areas of opportunity marked along Hillsborough
- Need shown for study of traffic in and around Cameron Park
- Study needed at intersection of St. Marys St. and Peace St.
- Consider traffic options along Hillsborough St. and Forest Rd.

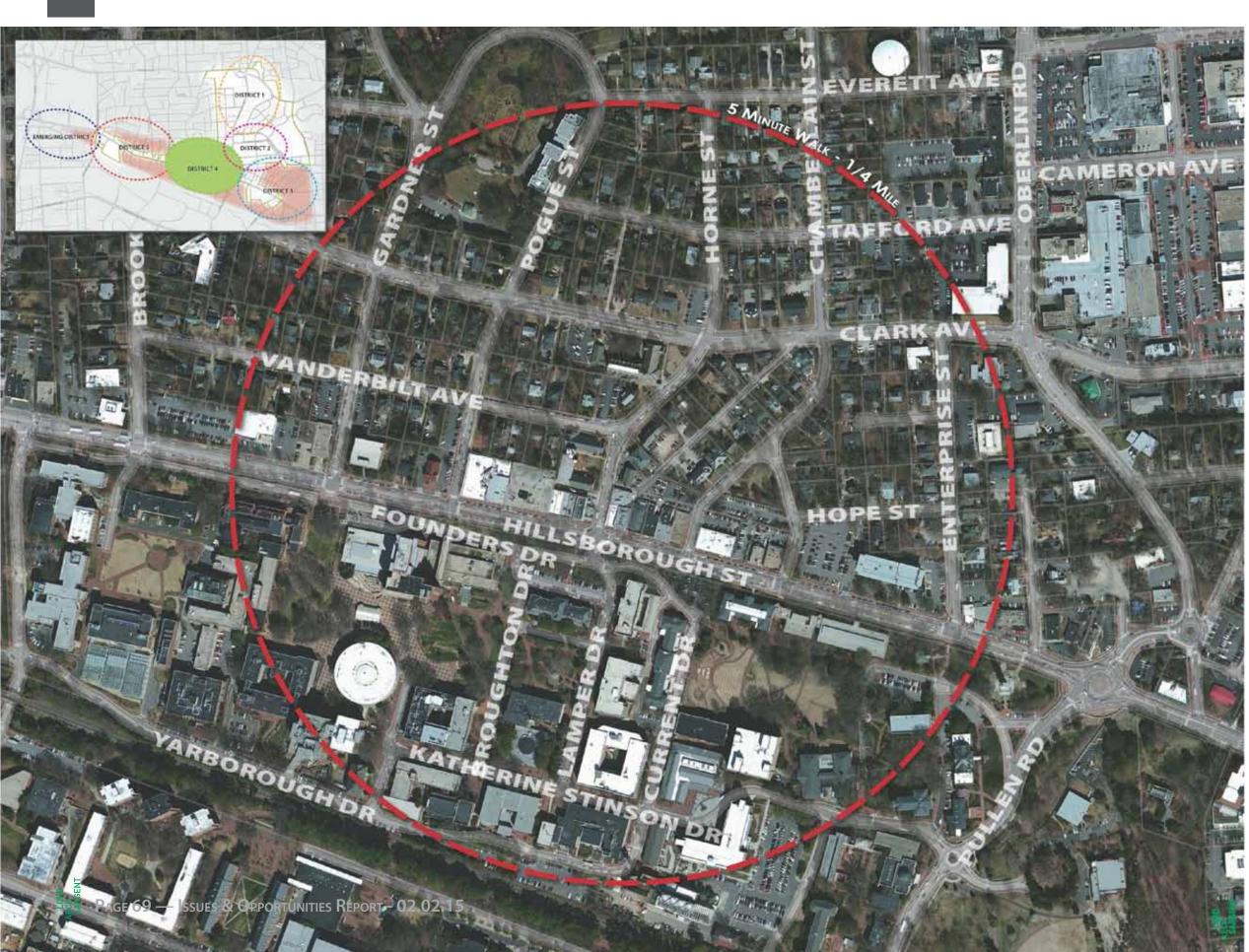
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My Home / Work

Additional Comment

Keep As Is

District 4



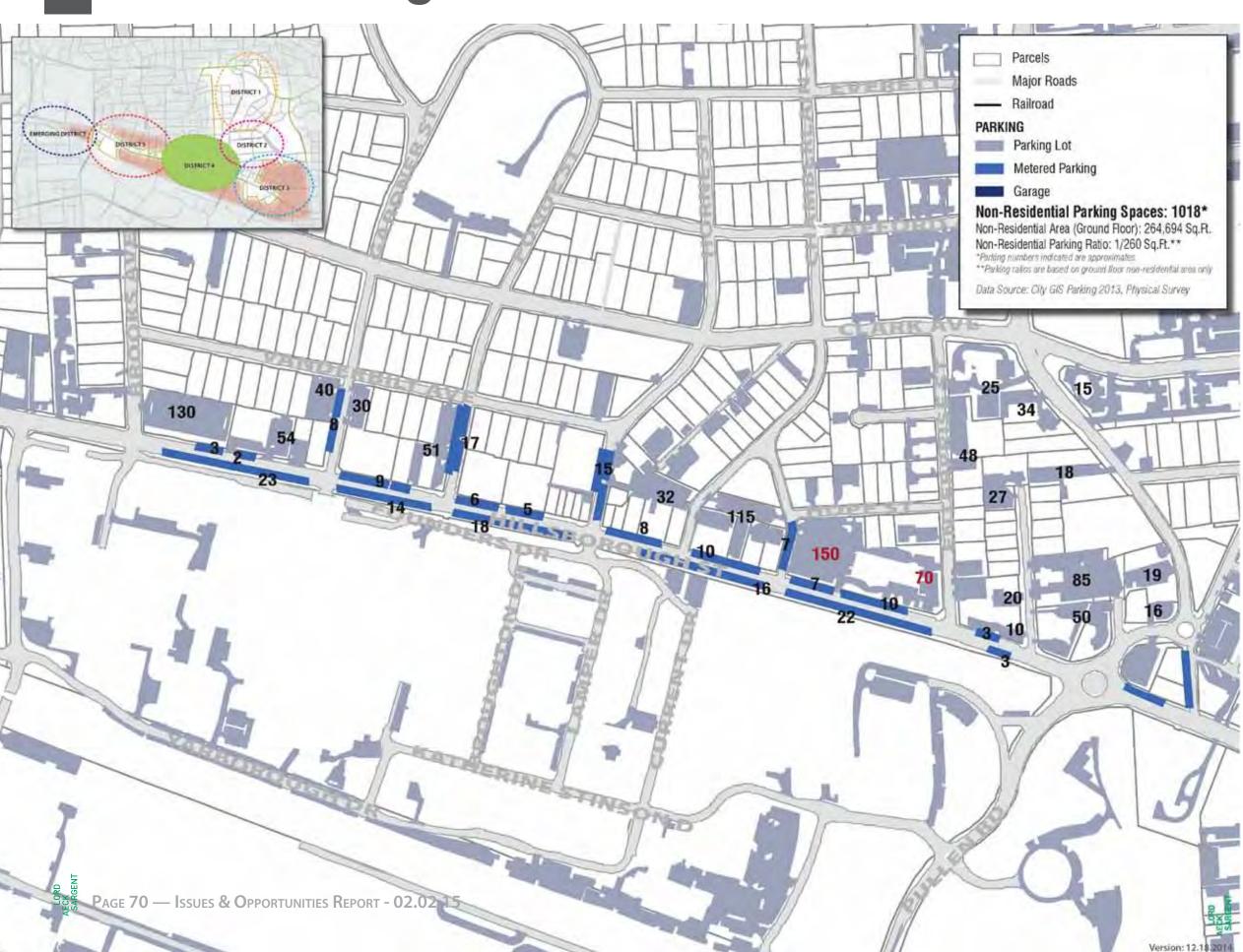
Issues:

- Long-term future for North Hall property
- Need for shared parking, additional parking
- Lack of open space

URBAN DESIGN:

- Phase 2 Streetscape
- New Pedestrian Connection from NC State
- Access and Location of Potential Transit Stations
 - Transition to University Park neighborhoods
- Potential bike/ped/transit corridor along Founders Drive? (with NC State)
- Transition area along Enterprise and Pullenbike/ped connection needed
- One-way streets
- Memorial Bell Tower as landmark

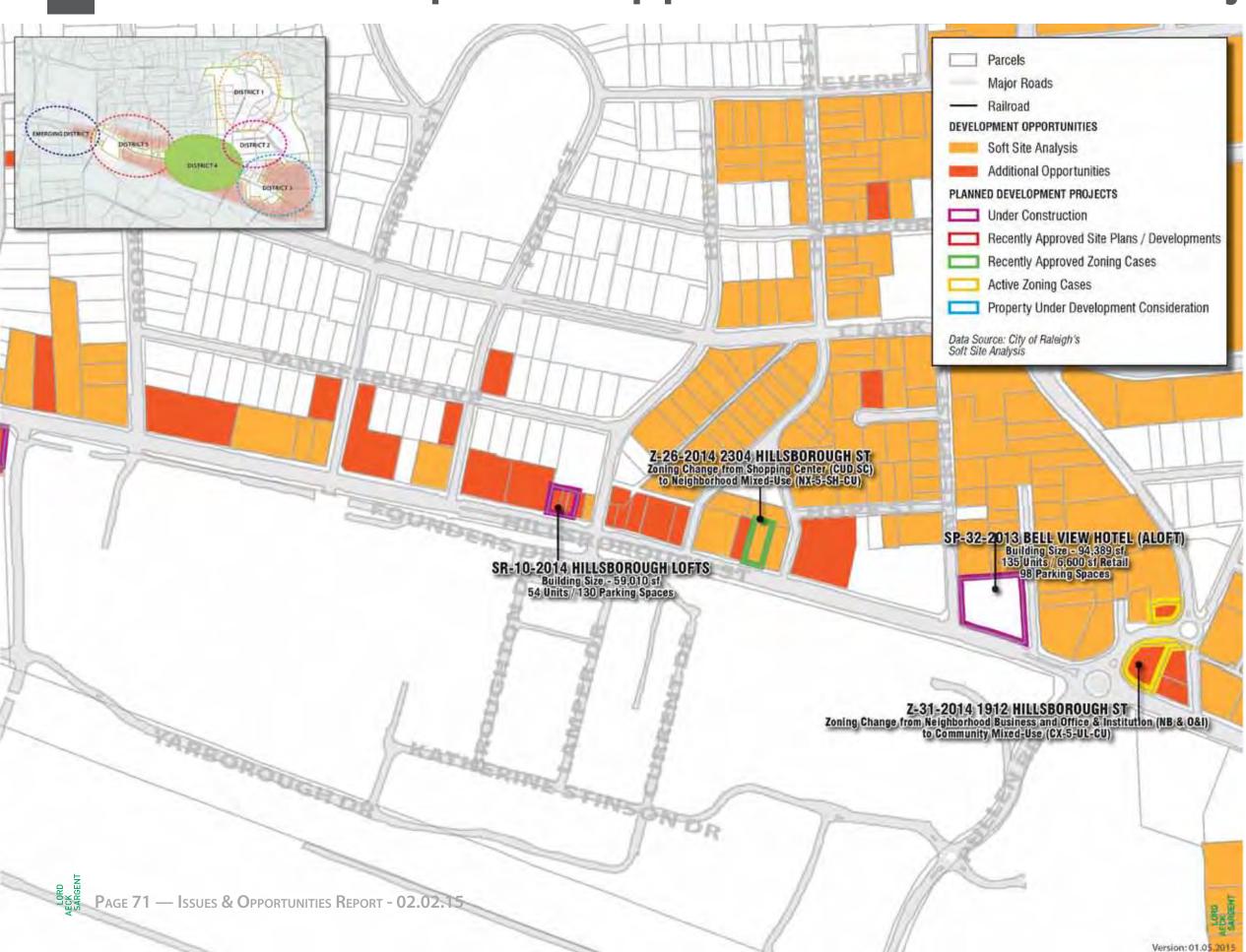
District 4 Parking Assessment



DISTRICT 4

- 1018 Non-Residential Parking Spaces
- 1 Parking Space / 260sf
- * Parking Numbers Are Approximate

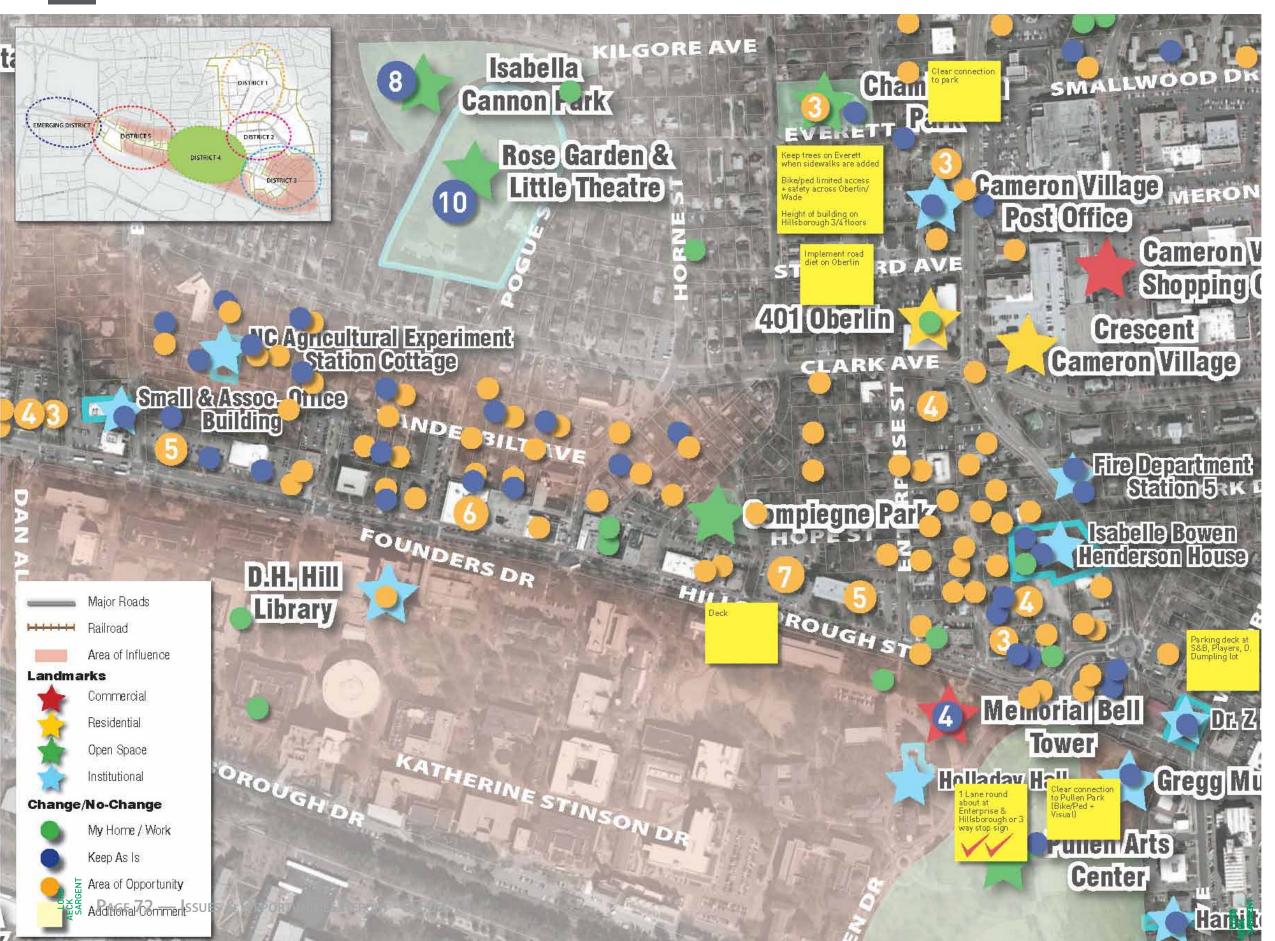
District 4 Development Opportunities & Planned Projects



PLANNED PROJECTS

- Zoning change from Office/Institutional to Mixed-Use
- Several Residential or Mixed-Use sites

District 4 Change / No-Change Exercise



SUMMARY OF PUBLIC COMMENTS

- Mixed views on opportunities along Hillsborough
- Area of opportunity at North Hall site
- Suggestions for intersection improvements at Enterprise and Hillsborough
- Clearer connection to Pullen Park recommended
- Bike/pedestrian limited access and safety across Oberlin/Wade Ave.
- Building height limitations along Hillsborough St.
- Call for road diet along Oberlin Road.
- Preservation of trees along Everett St.
- Parking deck at S&B, Players, D. Dumpling lot
- Parking deck suggested on Hillsborough and Logan St.
- Clear connection to Isabella Cannon Park from Oberlin Road
- 1 lane round about on Enterprise and Hillsborough or 3 way stop sign

District 5



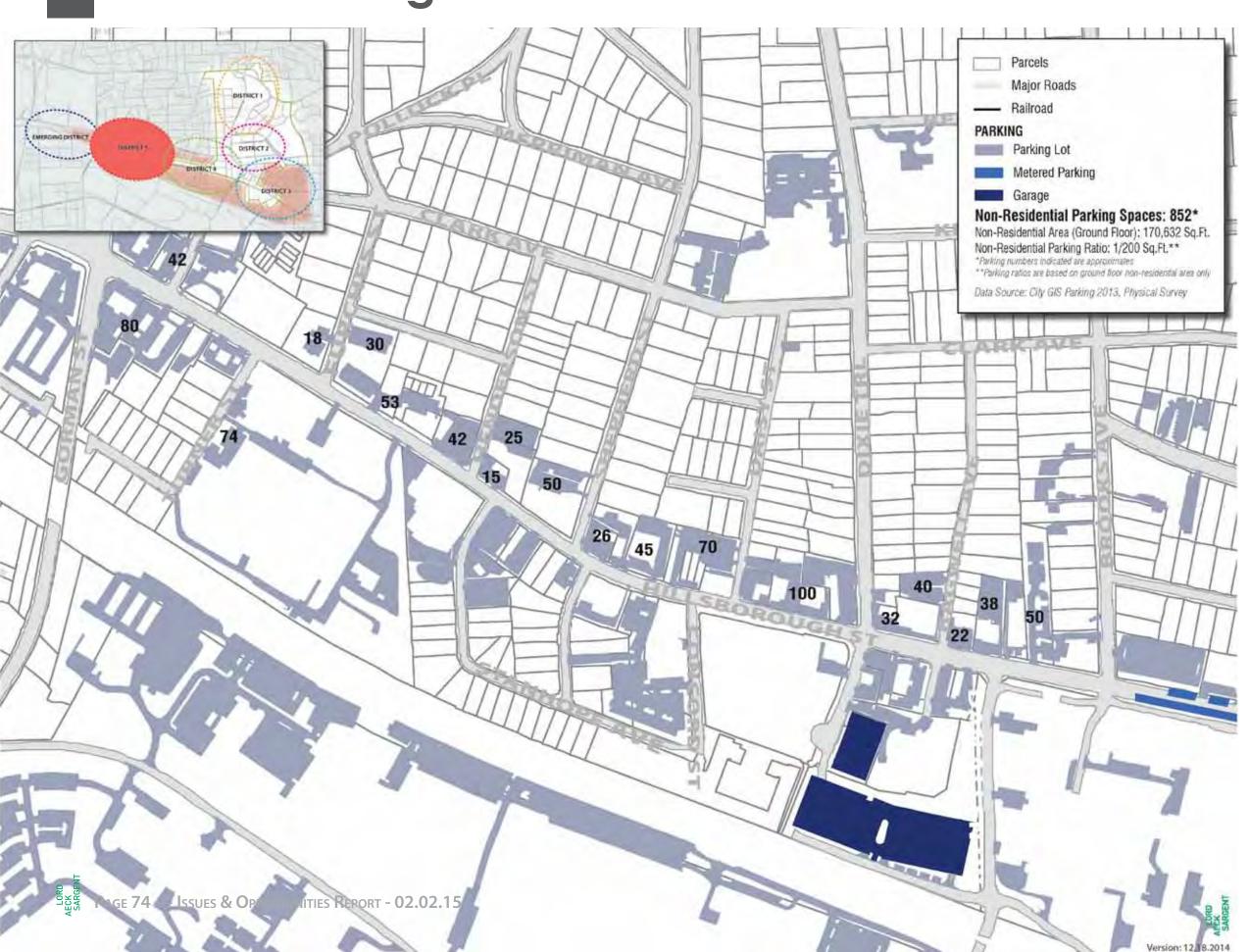
Issues:

- Preservation of remaining Stanhope residential area
- New student housing impacts

URBAN DESIGN:

- Redevelopment concentrated on south side
 potential opportunity for improvements to
 Hillsborough St
- Transition to University Park neighborhoods on north side
- Utility substation
- Potential future transit station area improvements

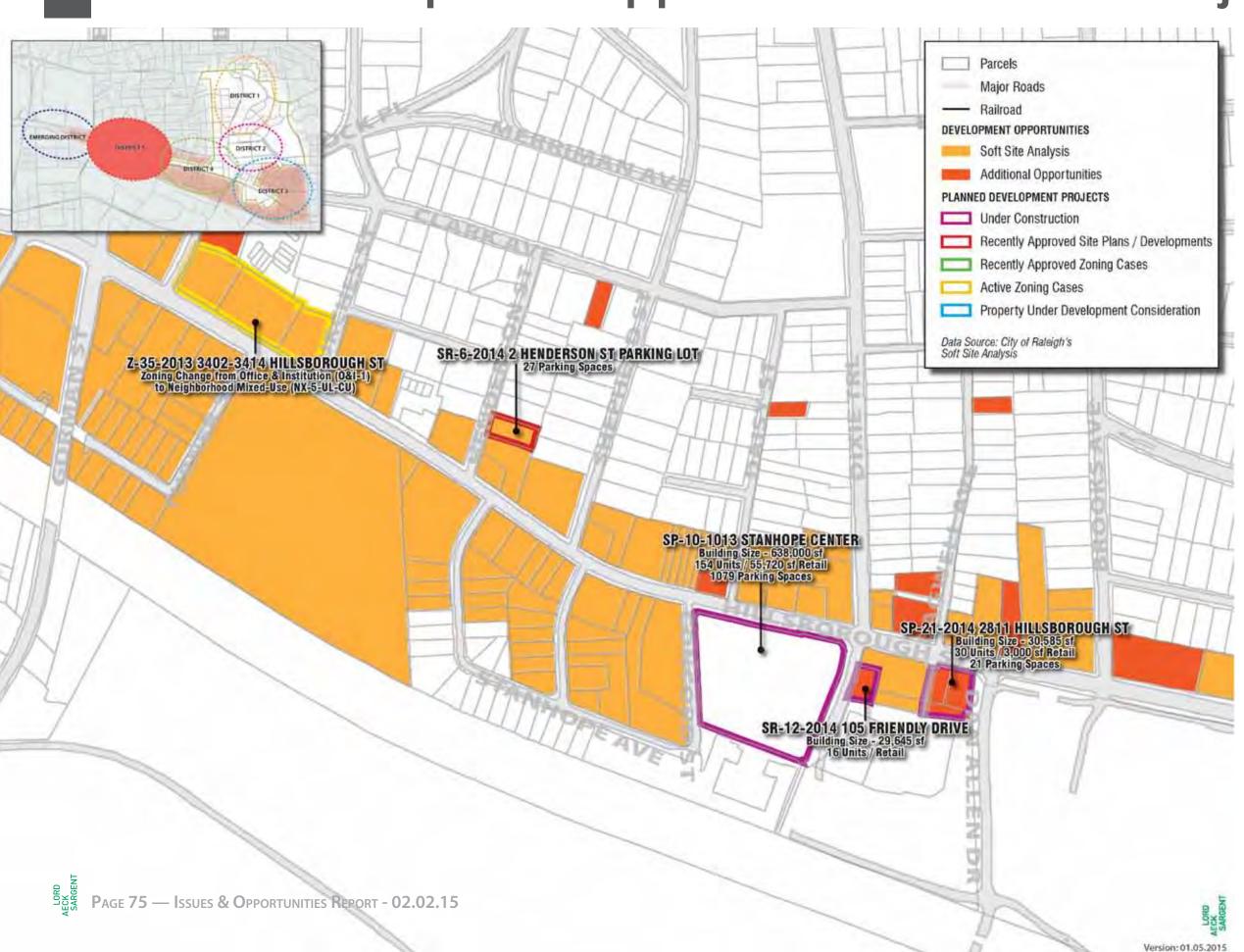
District 5 Parking Assessment



DISTRICT 5

- 852 Non-Residential Parking Spaces
- 1 Parking Space / 200sf
- * Parking Numbers Are Approximate

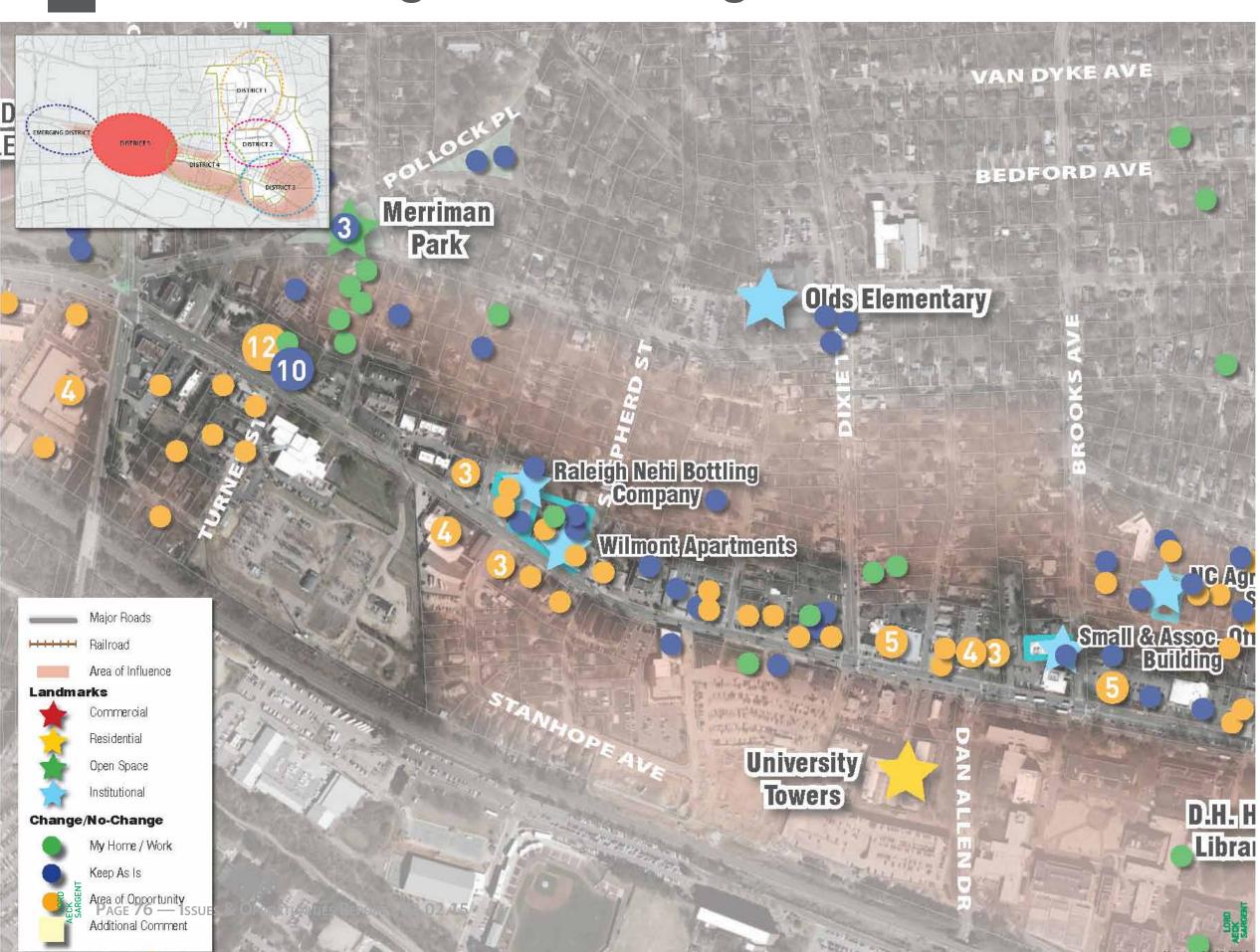
District 5 Development Opportunities & Planned Projects



PLANNED PROJECTS

- Zoning change from Office/Institutional to Mixed-Use
- Several Residential or Mixed-Use sites

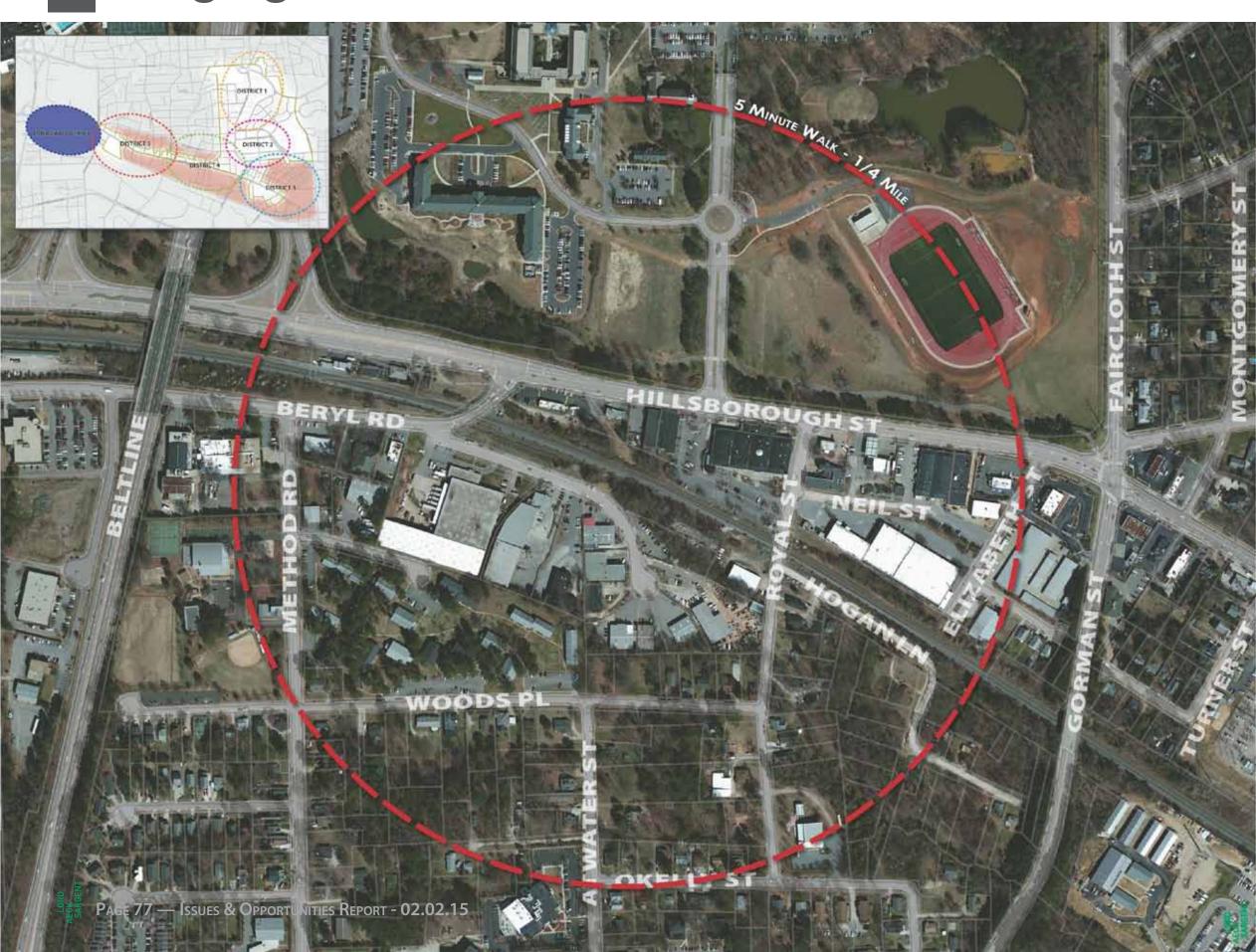
District 5 Change / No-Change Exercise



SUMMARY OF PUBLIC COMMENTS

- Numerous areas of opportunity along Hillsborough
- Preservation of historic sites and parks
- Disagreement on redevelopment of 3414 Hillsborough

Emerging District



This "Emerging District", although it lies in the Area of Influence, will be a critical transitional area for Hillsborough Street as it approaches the Beltline.

Issues:

- Potential long-term regional redevelopment
- Major institutions (NC State, Meredith College, Fairgrounds)

URBAN DESIGN:

- Railroad bisects area and crossings are difficult
- Transportation improvements at Beltline intersection
- Future Transit Station

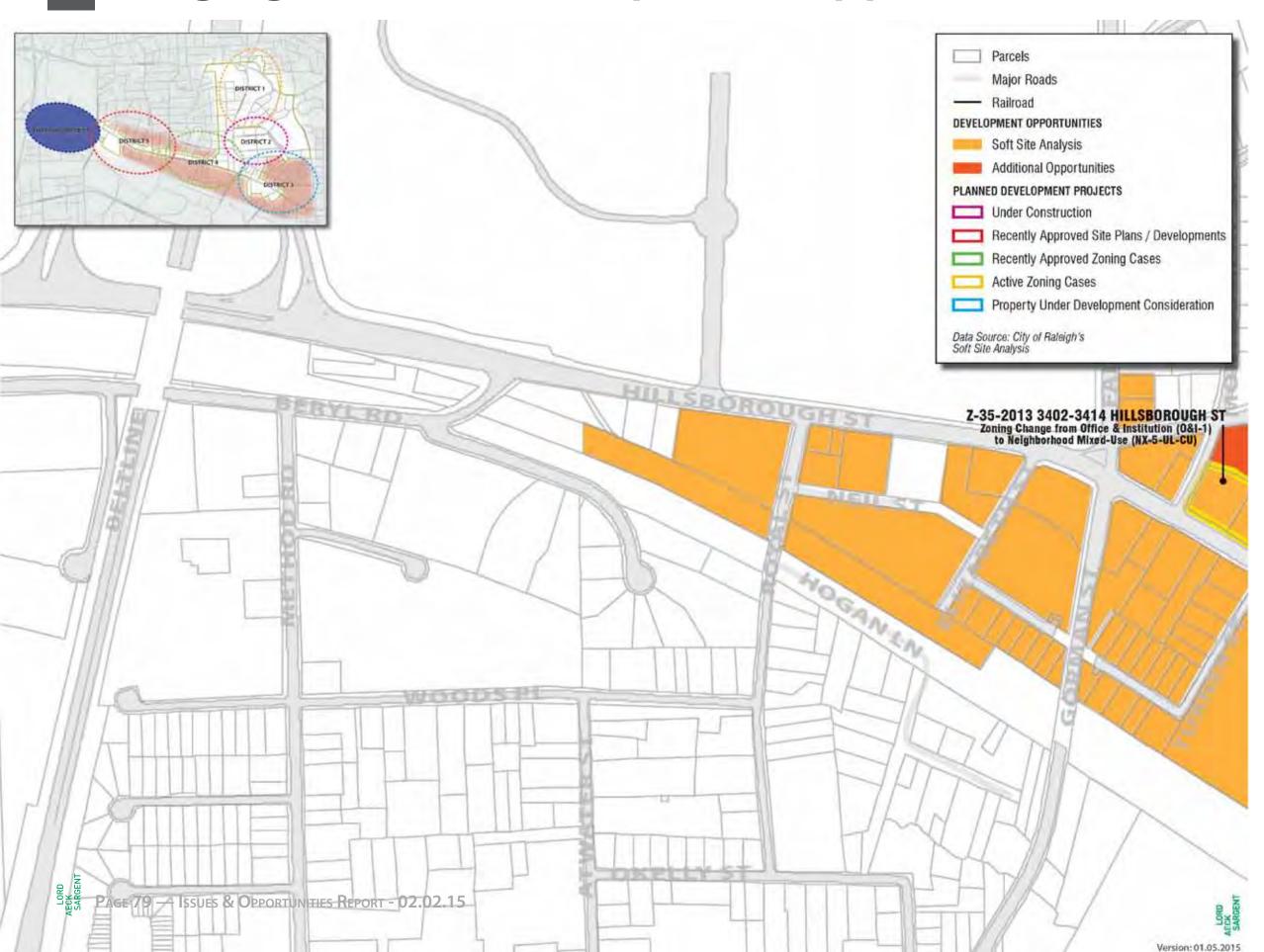
Emerging District Parking Assessment



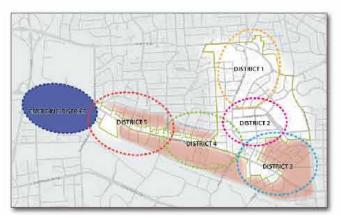
EMERGING DISTRICT

- 472 Non-Residential Parking Spaces
- 1 Parking Space / 475sf
- * Parking Numbers Are Approximate

Emerging District Development Opportunities & Planned Projects



Emerging District Change / No-Change Exercise







SUMMARY OF PUBLIC COMMENTS

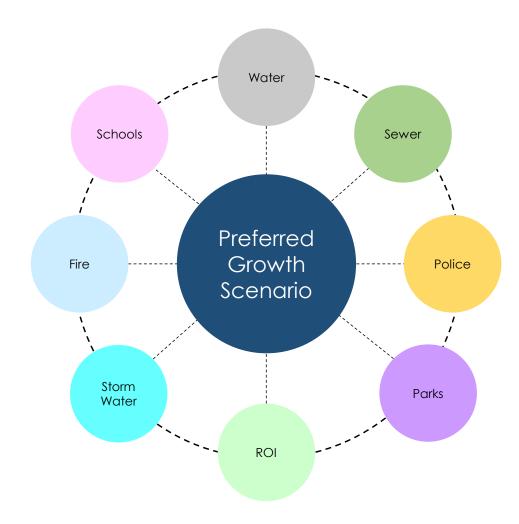
 Numerous areas of opportunity around Faircloth and Turner



CommunityViz

INFORMED SCENARIO PLANNING

- Community Impact Analysis and Alternative Comparison
- Data Management, Visualization, & Step-One Analysis
- More Informed Decision Making
- Conflict Resolution Tool





The following are the potential performance measures that will come from the CommunityViz Model of the district scenario planning.

DEVELOPMENT YIELDS

NAME	UNITS
Development Footprint	Acres
Total Population	People
Total Employees (Retail / Office)	Employees
Total Dwelling Units (Single-Family / Multifamily)	D.U.
Total Non-Residential Square Footage (Retail / Office)	SQ FT
Average Residential Density	D.U. / Acre
Average Non-Residential Intensity	FAR
Prevalent Housing Choices (For Sale / Rental, Type, etc.)	Percentage
Parking	Number of Spaces

COMMUNITY IMPACT ANALYSIS

NAME	UNITS
Demand for Water Service	GPD
Demand for Sewer Service	GPD
Demand for New Public Space	Acres
New Students Expected	Students
Internal Street Connectivity Index	Index
Sidewalk Coverage	Percentage
Bicycle Coverage	Percentage
Transit Proximity	Residents or Employees
Preserved Open Space (Greenprint)	Percentage
Trip Generation (Traffic)	Trips
Impervious Surface	Percentage
Jobs-Housing-Shopping Proximity	Index
Return on Investment (ad valorem tax value)	Percentage

Notes:

- 1. Performance measures in CommunityViz are focused on things we can count, add, or classify inside the study area. Reporting geographies assigned in the model with allow for sub-area reporting.
- 2. We recommend no more than ten community impact performance measures for sharing results with policy-makers, the general public, or other key stakeholders.
- 3. Performance measures listed above assume the project team can develop coefficients, elasticity factors, etc. appropriate for the study area..
- 4. Some performance measures could be impacted by the unit of analysis used in CommunityViz (i.e., parcel or grid cell).





LORD AECK SARGENT MARKET ANALYSIS FOR THE CAMERON VILLAGE AND HILLSBOROUGH STREET CORRIDOR STUDY AREAS

Study Area Context

The two study areas, shown in the maps at right, are located in older, established areas of Raleigh. They benefit from a location proximate to, and between, two of Wake County's larger employment cores: Downtown Raleigh, anchored by State government, and North Carolina State University and its related

research-related functions.

Intown Raleigh, like intown Charlotte, Atlanta, and other major cities, has experienced a rebirth over the last 15 or so years, driven by a mix of convenience and an appreciation for more walkable, interactive areas and a boredom with the suburbs. Indeed, areas such as Downtown Raleigh, the Glenwood Avenue Corridor, Cameron Village and, to a lesser extent, the Hillsborough Street Corridor, have experienced solid new residential investment, office markets that have stabilized and attracted significant attention from major tenants in the area,



have seen new restaurants and stores open where vacant spaces and or Class B tenants used to be.

While highly proximate to one another, and indeed competing for the same market audiences, the study areas are actually quite different and enjoy varying strengths and challenges. The following summarizes these strengths and challenges:

Cameron Village	Hillsborough Street
<u>Strengths</u>	<u>Strengths</u>
Highly established intown retail destination	Adjacent to NCSU with roughly 35,000 students
 Strong surrounding neighborhoods with mature, long-term residents 	 Established corridor with easy access into Downtown as well as to the area freeways
 New rental residential and retail investment adjacent to Cameron Village itself 	 Largely walkable with street-fronting retail and a destination for students
Sense of authenticity—doesn't feel contrived	 Also new investment, including new rental apartments and a new aLoft hotel
Proximate to major intown desinations and demand generators.	 Significant open space and recreational opportunities, including the YMCA and Pullen Park.





Cameron Village	Hillsborough Street
<u>Challenges</u>	<u>Challenges</u>
Walkable environment breaks down in many areas	Majority of corridor is student-dominated, limiting interest from other intown groups
Most uses are freestanding and suburban in scale—lacks dynamism	Very few significant development sites along corridor, with most properties being small and
Lacks appeal to younger audiences	relatively shallow in depth
Majority of redevelopment opportunities exist on a smaller scale—land assembly a challenge	Lack of parking noted as being an issue, particularly for retail
Lack of regional freeway access combined with less walkable environment tempers office opportunities	Retail lacks major anchors needed to draw people to the area—largely comprised of smaller, independent uses

The opportunity for each area is to tap into intown Raleigh's resurgence, attracting an diverse intown market comprised of not only younger students and graduates, but working professionals and empty nesters and retirees as well. For Cameron Village the opportunity is to build on the existing assets in place, notably the Cameron Village Shopping Center, and create a more walkable, more dynamic location through new mixed-use development. For Hillsborough, the opportunity is to stretch beyond the student market and attract residents, office tenants, retailers and others to the corridor, all through a scale and intensity that is walkable and comfortable.

Employment/Job Growth

Raleigh-Durham is among the nation's strongest job growth markets, with Wake County—the largest county in the region—accommodating for the largest share of this growth. Over the past 17 years, Wake County has added an average of 9,500 net new jobs, including high quality, office-utilizing jobs. Indeed, the greatest shares of growth in the region are: Professional and Business Services, Education & Health Services, Retail and Government, most of which utilize some, or a good bit, of office space. Indeed, assuming around 275 square feet (SF) of space per person, office-using growth in these industries supports more than 1,000,000 SF of new office space annually in the county.

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Growth, 1996 - 2013	Total Growth	Share of Growth	Type of Space Used
Natural Resources & Mining	-60	0%	NA
Construction	6,450	4%	NA
Manufacturing	-5,826	-3%	Industrial
Wholesale Trade	5,249	3%	Industrial
Retail Trade	17,723	10%	Retail
Trans., Warehousing, & Utils	-1,010	-1%	Industrial, Office
Information	4,305	3%	Flex/Office
Financial Activities	10,039	6%	Office
Prof. & Business Svcs	45,178	26%	Office
Education & Health Svcs	29,280	17%	Institutional, Office, Retail
Leisure & Hospitality	26,254	15%	Retail, Hotel
Other Services	11,296	7%	Retail, Institutional, Industrial
Government	23,232	13%	Office, Industrial, Institutional
Total Growth	172,111		





Like office-using growth, retail growth in the county has been strong as well, with support for nearly a million square feet of space being generated annually, on average. As will be discussed later in this report, the overwhelming share of this growth is occurring outside of the BeltLine, with intown areas seeing little in terms of significant new retail. Unlike the office-serving jobs discussed on the previous page (and shown in light green on the preceding table), retail and dining jobs are largely lower wage and won't create significant new demand for housing in the two study areas.

Employment in the two study areas is relatively small, with the two combined study areas having only around 5,400 jobs in total. Over the last decade, the study areas remained stagnant or lost jobs in spite of intown (Inside The BeltLine) Raleigh seeing employment double. It should be noted that this does not include potential employment growth at NCSU as those jobs are technically located outside of the study areas.

As can be seen in the table below, employment in the areas varies somewhat, with Cameron Village having more retail employment and Hillsborough having more Arts, Entertainment & Recreation employment (fueled in part by the YMCA). Both areas have small but solid concentrations of Real Estate & Leasing employment, as well as Professional Services firms. Both also have solid concentrations of Administrative & Support functions, which are largely back-office functions utilizing older, and less expensive office space.

Industry Sector	Cameron Village	Hillsborough Street Corridor	Inside I- 440	Location Quotient (Cameron to Inside I-440)	Location Quotient (Hillsborough to Inside I-440)
Agriculture, Forestry, Fishing and Hunting	0	0	315	0.0	0.0
Construction	88	6	3,275	1.2	0.2
Manufacturing	25	15	1,785	0.6	0.8
Wholesale Trade	33	42	3,296	0.4	1.1
Retail Trade	658	46	4,420	6.5	0.9
Transportation and Warehousing	8	0	507	0.7	0.0
Information	3	135	3,191	0.0	3.8
Finance and Insurance	332	53	4,835	3.0	1.0
Real Estate and Rental and Leasing	283	144	1,273	9.7	10.2
Professional, Scientific, and Technical Services	386	137	9,510	1.8	1.3
Management of Companies and Enterprises	89	4	3,802	1.0	0.1
Admin. & Support, Waste Mgt and Remediation	510	195	8,131	2.7	2.2
Educational Services	325	16	7,049	2.0	0.2
Health Care and Social Assistance	105	113	23,272	0.2	0.4
Arts, Entertainment, and Recreation	1	246	1,330	0.0	16.6
Accommodation and Food Services	578	452	6,050	4.2	6.7
Other Services (excluding Public Administration)	143	150	2,788	2.2	4.8
Public Administration	76	24	74,714	0.0	0.0
Total	3,643	1,778	159,543	1.0	1.0

Health Care, another sector that can offer higher-paying jobs, and Public Administration (a large sector of the Raleigh economy) are largely absent from the study area. As with office-serving uses, these two sectors are somewhat tempered in the study areas by the lack of regional access and by the lack of large development sites and won't likely represent a significant presence in the area going forward.



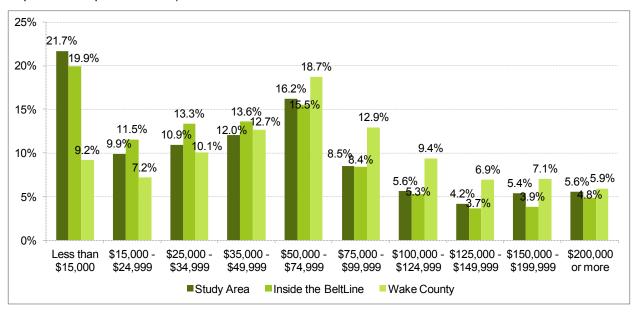
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Demographics

The Cameron Village/Hillsborough Street Corridor is a demographically diverse area, featuring a broad mix of households by age and income, from struggling students to affluent empty nesters. Given the location of the study area, this is not surprising.

The study area features a greater share of lower-income households (mostly students) and higher-income households (maturing seniors) relative to Inside the BeltLine overall. 21% of study area residents earn in excess of \$100,000 annually (compared to 18% Inside the BeltLine and 29% in Wake County overall), while 42% of study area households earn less than \$35,000 annually (45% and 26% in the respective comparison areas).



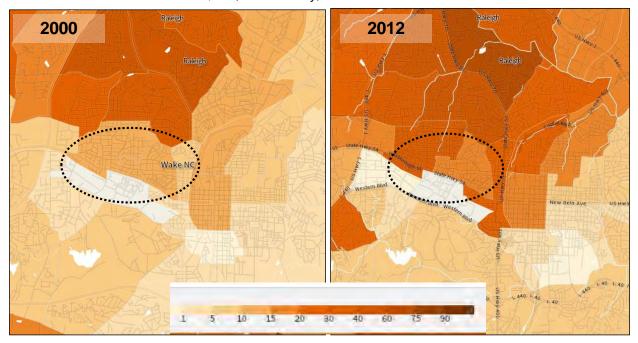
This said, the study area is gaining momentum at the high end, with the large majority of growth occurring in households earning more than \$125,000 annually while seeing overall no change in households with incomes under \$35,000.

As the two maps on the following page shows, high levels of affluence in North Raleigh have pushed further into town, with a greater share of study area households (mostly in the Cameron Village study area) having incomes above \$100,000.

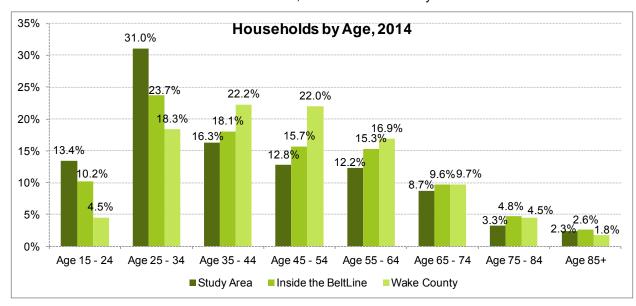




Households with Incomes Above \$100,000 Annually, 2000 and 2012



While diverse in incomes, the study area is also diverse in terms of age, although it skews toward younger households, with 45% of study area households being under 35 years of age, much higher than the 34% Inside the BeltLine and 23% in Wake County overall. Largely missing from the study area today are households typically in their family years—those 35 to 54—as many of those households have opted to live in the suburbs for their children. Above 65, the areas are all fairly similar.





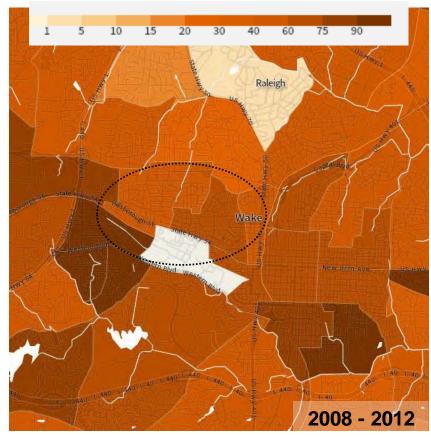


Finally, the study area skews heavily towards renting versus home ownership, with around 60% of households in the Cameron Village area being renters and upwards of 90% or more of Hillsborough Corridor residents being renters. It should be noted that this data precedes the development of 401 N. Oberlin and Crescent Cameron Village, as well as Stanhope, which is now under construction.

While appearing high, intown areas, particularly those close to employment cores and universities, tend to skew towards rental product.

Retail Overview

As referenced earlier, Cameron Village Shopping Center is indeed the most significant intown Raleigh retail core, attracting intown residents,

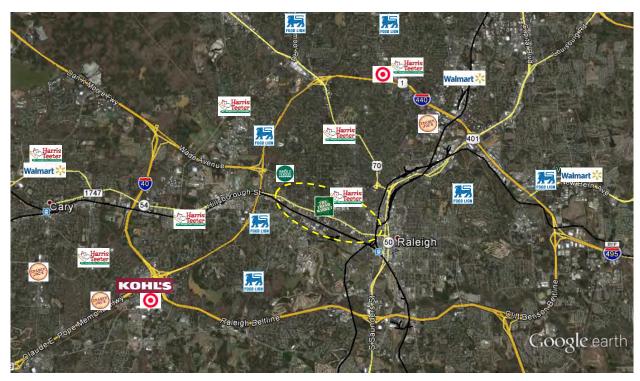


Downtown employees, and NCSU students with its grocery, shopping, and dining opportunities

As can be seen in the map below, intown Raleigh itself is somewhat of a retail desert, with no malls and big box retailers present, and few national tenants in the area. For this type of shopping, intown residents, including those of the study area, must go outside of the BeltLine to uses like Target, Kohls, Walmart, or even a modern first-run movie theater. While many of these uses have historically shunned intown areas, the rebirth of intowns throughout the nation has resulted in stores like Target and Walmart, as well as national grocery chains, creating urban format stores that can be delivered in mixed-use or smaller-scale environments. The key in Raleigh, however, is finding the sites for such retailers.







What intown does offer is a growing local and independent restaurant base and smaller independent shops, many of which are now opting to locate in areas like Downtown Raleigh and the Glenwood Avenue corridor. Cameron Village offers a large variety of dining options from fast casual to full-service sit-down restaurants and has emerged as an intown destination for lunch and dinner. Hillsborough Street's dining opportunities are largely focused on NCSU and local college students, with there being a significant lack of quality dining options in the corridor.

The Central Raleigh retail market is relatively small, boasting around 700,000 square feet of space, and very tight, with vacancy rates of less than 4% today. Overall the submarket, which includes most of the Inside the BeltLine area with the exception of smaller areas close to I-440 to the north and east, has only experienced minor absorption, with absorption over the last 14 years totaling only 280,000, much of which has gone into existing centers or spaces. By comparison, the Cary/Morrisville market is 10 times the size of Central Raleigh and absorbed 13 times the space. The tight Central market has also resulted in fairly expensive rents, with average lease rates being the second highest in the metro area, trailing only Northern Wake. Rents intown today average approximatley \$28/SF, with Cameron Village offering some of the strongest rents at an average of \$35/SF (on \$375 sales/SF). The Hillsborough Street corridor, lacking the destination uses that attract shoppers and patrons, is somewhat more affordable, with new space leasing in the mid \$20s/SF and older space being largely in the \$10s/SF. Assuming an average lease rate of around \$18/SF along the Hillsborough Corridor, this translates into sales of around \$225/SF; considered low relative to national averages of around \$350/SF.

Noell Consulting Group (NCG) created a demand model to estimate demand potential for retail intown in 2014 and over the next decade and beyond. This demand model incorporates the local market audiences fueling demand for retail including residents in the greater area, (shown in the map on the following page), college students, and intown employees. While this radius is somewhat small, we

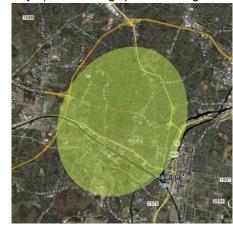




believe it is appropriate given access issues, freeway networks, etc. This radius should be considered a "first wave" of demand (over the next decade or so), with new retail in the area first appealing to intown residents, workers and students and, over time, having an ability (with strong placemaking and

destination-type restaurants) to penetrate market audiences beyond the area, including those outside of the BeltLine. This said, some stores and restaurants may be considered destinations pull from well beyond this area. Overall though, we believe the majority of stores will first pull from this area with Cameron Village being the primary destination (and a few stores on Hillsborough) that can pull from beyond.

This Primary Market Area (PMA) should be considered somewhat conservative in that it does not factor in Downtown employees and visitors, or arena visitors, although does provide for a 20% "bump" from outside sources, thus incorporating these demand sources indirectly. US Census data was utilized to measure existing supply with net demand being calculated for 2014, 2020, and 2025.



NCG's demand model found significant unmet demand for retail and dining uses in the study area (including the additional "spheres of influence", with <u>net</u> demand totaling more than 645,000 SF in the area in 2014, growing to more than 758,000 over the next decade. This demand is summarized in the table below:

	2014	2020	2025
Intown Primary Market Area Net Demand	645,000	701,000	758,000
Cameron Village/ Hillsborough Capture (Net)	498,500	523,000	558,000

It should be noted that the area can support around 41 square feet of new retail space for every new person added in the Primary Market Area (PMA). As intown continues to grow (as assumed above), demand for new space should continue at this pace.

The following summarizes demand for key <u>selected</u> store types in the study areas today (for the larger Intown PMA), with estimates for 2025 being provided as well.

•	Other General Merchandise Stores (e.g. Target)	286,000 SF today/306,000 SF by 2025
•	Department Stores (e.g. Belk, Macy's)	170,000 SF/181,000 SF
•	Building Materals/Supply (e.g. Home Depot)	114,000 SF/129,000 SF
•	Miscellaneous Retailers (e.g. PetSmart)	36,000 SF/39,000 SF
•	Restaurants (full & limited service)	26,000 SF/43,000 SF

• Furniture Stores



Some additional store types are largely in balance, including grocery stores and drug stores, although this does not preclude new additions to the market in these categories, as some brands may not be represented, or be underrepresented, in the study area (e.g. CVS, Trader Joe's). As noted earlier, a key issue here is that many of these retailers are large square foot users and, with the exception of more urban areas, may not be able to find quality sites intown.

29,000 SF/31,000 SF







Indeed the study areas themselves lack a suitable site for uses such as a Home Depot, Belk, or even a Target or Walmart, although the latter two have demonstrated a willingness to locate in the ground floors of residential buildings to get into key intown markets. As such, they could represent an opportunity at some point in the future. One unique opportunity does exist for the Hillsborough Corridor, when factoring in the larger sphere of influence (i.e. factoring in the area around the Hillsborough/I-440 interchange: the creation of a larger retail center on land currently owned by the State or by NCSU adjacent to the University Club and the School of Veterinary Medicine. Such a center would require a joint venture effort, but does represent opportunities for the greater corridor.

Based on the attributes of each study area specifically (not including spheres of influence), we believe Cameron Village, being an already-established location in the market, offering greater centrality to a larger residential base and larger parcels for potential redevelopment, represents a stronger retail location than does Hillsborough Street (the study area itself, not including the I-440 interchange area). When factoring in the possibility of the creation of a larger center at Hillsborough & I-440, opportunities for that area become more significant. Within the study areas, major thoroughfares lack traffic volumes desired by many destination retailers, with each having peak volumes between 15,000 and 20,000 cars daily. Those volumes are more consistent with neighborhood/locally-driven retail as opposed to destination retailers and bigger box users.

Through a store type by store type analysis, NCG estimates current (2014) potential support for an additional 143,650 SF of retail space in the Cameron Village area and approximately 64,800 in the Hillsborough Street corridor. When factoring in the potential for the Hillsborough/I-440 area, demand grows to nearly 288,000 square feet in the corridor. It should be noted that, outside of the bigger box users captured around I-440, demand in any particular category can be captured in either location. Cameron Village's capture is higher given it is already an established destination in the intown area. Given land costs in the study areas proper, in the large majority of cases, new retail space can only be accommodated in the first floor of a mixed-use building.

As noted earlier, net demand may or may not exists in some categories, but stores lacking a presence intown or in these areas, may opt to locate in the areas and compete for demand with others already satisfying the needs of the marketplace (CVS planned at Stanhope being an example).

Store Type and 2014 Demand Estimates	Cameron Village	Hillsborough Street
Furniture	16,000	5,300
Home Furnishings	0	1,600
Electronics/Appliances	10,250	3,400
Building Materials/Hardware	13.750	0
Lawn/Garden Stores	4,000	12,000
Specialty Food Stores	4,000	2,600
Beer, Wine Stores	6,400	6,400
Jewelry, Luggage or Leather	2,250	0
Sports, Hobby, Music	1,000	1,000
Department Stores	0	0
General Merchandise	54,800	0
Office Supplies/Gifts	5,200	5,200
Other Miscellaneous	12,000	12,000
Full-Service Restaurants	8,100	4,400
Limited Service Restaurants	5,900	1,400
Total Capture of Net Demand	143,650 29%	64,800 13%





A note on the Hillsborough Street Corridor: parking is critical to retail in Southern markets, where auto travel dominates the mode of transportation, and the corridor today lacks parking. Identifying opportunities to better utilize existing parking and/or create additional parking will be important to the corridor, particularly retail. Balancing the needs of different market audiences and the goals for the corridor will be important, as goals for reducing parking requirements on residential buildings may have an impact on parking supply available for retail in the corridor.

Office Overview

As with retail growth, office growth in the region has largely occurred outside of the BeltLine, with intown areas being relative stable and experiencing growth from a blend of government and smaller professional services firms.



The two study areas actually traverse three office submarkets, including Downtown, Cameron Village, and West Wake. Given the character of West Wake, with office buildings provided in a more suburban, campus setting, we've limited our focus on the Downtown and Cameron Village submarkets. Since 2000, total absorption in these two submarkets has been approximately 840,000, or 7.7% of the region's office demand, or 20% of Wake County's demand. The large majority of this growth (84%) has occurred Downtown by larger government and corporate users. Cameron Village, meanwhile, has only accounted for

approximately 140,000 SF of absorption since 2000, or roughly 10,000 SF annually.

The Cameron Village office market is relatively diverse, featuring a mix of smaller firms (85% of tenants, but 18% of total employees), large back office functions (roughly one-third of office employees in the area) and a blend of tenant types and sizes accounting for the other half of occupied space. Most of these firms are local-serving and include professional services, some medical, and real estate offices.

While the office market in the area is relatively tight—Cameron Village enjoys a vacancy rate of less than 4% currently—this tightness is due to in part to two factors: moderate absorption (more recently averaging around 20,000 SF annually) and removal of office buildings from supply. This latter factor is a true indicator of the health of the market, as brokers have noted developers are now buying office buildings, demolishing them, and building residential product, or converting office buildings to residential product (in the case of 1300 St. Mary's). Lease rates in the area reflect this, with Cameron Village offices leasing for an average of \$18/SF, a rate that has grown by less than 1% annually since 2000. While little direct data is available on the Hillsborough Street corridor, reviews of area leases indicates most space is

in the low to mid \$20s/SF, with a few spaces achieving higher.

As noted earlier, the vast majority of firms in the area are small, having less than 20,000 employees each. These firms are often those that can and will venture into more creative or unique spaces, such as above retail in a town center, an older loft building, or newer smaller buildings. Given the vast majority of space in the Cameron Village area can be found in dated, relatively generic office buildings, this should represent an opportunity for the study area going forward. A similar opportunity exists for



the Hillsborough corridor, which has some older, unique spaces suitable for office use.



Responding to this perceived need, one new office building is being developed in the Cameron Village area, a 13,300 SF building with suite sizes largely between 1,400 SF and 3,000 SF; appropriate given the high numbers of tenants in the market. Rents are relatively high for the area at \$26 - \$30/SF. The space is currently under construction and partially leased, so no firm track record can be established on the receptiveness of the space to the market.

NCG created an office demand model for the Cameron Village area (including the Hillsborough Corridor) over the next five years and beyond. Based on this demand model, which incorporates Wake County employment growth, office absorption metrics and employment growth at a subcounty level. Based on this analysis, we believe the combined study area can support around 18,000 to 25,000 square feet of net new office space annually. This space should be accommodated above retail or on the ground floors of residential buildings, or in newer, more boutique-type buildings.

As the study areas become more established as more dense neighborhoods, and the mixed-use environment and quality of life enhanced, demand potential for office space may increase over time. Examples of this can be seen in areas such as Charlotte's South End, which initially saw modest office demand and development but, as residential and retail offerings grew, saw more significant office development and demand over time, with quality of life pulling tenants into the area.

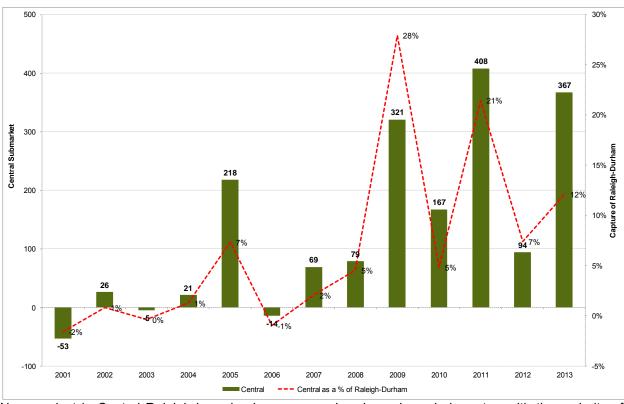
Rental Multifamily Overview

The lone bright spot in real estate over the past five years has been multifamily, and Raleigh is no exception to that. Nationally this multifamily has been heavily focused in intown areas; areas that are more convenient to major employment, shopping and entertainment cores and areas that are more walkable. Included in this are areas such as: South End in Charlotte; Inman Park/Old Fourth Ward and Midtown in Atlanta; Logan Circle, NoMa, H Street in Washington, DC; and Uptown in Dallas. Raleigh is also seeing significant infill of new rental multifamily in areas including Cameron Village, Glenwood Avenue, and Downtown. These new rental communities are drawing not only from younger Generation Y's (those generally under 35), but from more mature professionals and increasingly, empty nesters amd retirees.

As shown below, Central Raleigh, which largely comprises the area inside the BeltLine (with the exception of some of southwest Raleigh), has significantly increased its capture of regional demand from 1.8% between 2000 and 2008, to 12.5% from 2009 to 2014. This capture has resulted in average annual absorption rates of 270 units, a number that will increase once 2014 data is incorporated.







New product in Central Raleigh has also been more urban in scale and character, with the majority of new product being either midrise units "wrapping" a parking structure or high-rise construction Downtown. These development models have become achievable through rents pushing north of \$1.50 to \$1.60/SF, a threshhold needed to justify decked parking. Indeed, these new projects are averaging close to \$1.80/SF and clear that hurdle. These higher rents have also been achieved through a reduction in unit sizes, delivering more efficient units and seeking to maintain a solid absolute price point. Indeed, developers of intown product are paying between \$15,000 to \$25,000 per door for land which, assuming densities of 75 to 90 or more units per acre, translates into supportable land prices of \$1.2 to \$2.0 million per acre, not including potential impacts from ground floor retail space.

Overall rent growth in Central Raleigh has been relatively moderate over the past five years, with the market responding to a burst of new supply in 2010 and 2011, then recovering and posting solid growth in 2012 and 2013.

There is a solid pipeline of product slated to deliver in Central Raleigh in the coming years, with as many as 3,000 units coming online in the next five years. Against this, NCG created a demand model to gauge support for new rental apartments in Central Raleigh and in the combined Cameron Village/ Hillsborough Street study area. As shown below, we believe these areas can support approximately 170 net new rental apartment units annually through 2025. It should be noted that the existing pipeline represents an approximately 6-year supply based on this demand, indicating short-term demand can be satiated by this supply.





Avg. 2011 - 2016 - 2021 - 2011 - 2015 2025 2025

Wake County Demand		14,480	12,545	42,237
Central Capture	17.0%	17.0%	17.0%	17.0%
Annual New Rental Apt Growth in the Central Submkt	517	492	427	479
Cameron Village/Hillsborough Street Capture	35%	35%	35%	35%
Annual Supportable New Units, Cameron Village & Hillsborough Corridors	181	172	149	168

A portion of this demand has been generated through new privately-developed student housing. This product, measured typically in number of beds vs number of units, has seen significant development over the last few years, including Valentine Commons (900 beds), Stanhope (800 beds) and several smaller student-targeted deals along Hillsborough. Additional student-oriented product is now planned south of the corridor as well, with a potential for 400 to 500 additional beds. In total this would provide for 2,200 to 2,400 new beds during a period in which campus enrollment has largely been flat. Indications of overbuilding are already evident in the area, with reprsentatives from NCSU noting a drop-off in demand for student housing and the first major project to deliver, Valentine Commons, still posting a 16% vacancy rate two years after delivery.

With the majority of NCSU's enrollment growth (3,000 students by 2020) coming in graduate students—a population often averse to larger student-targeted product—this oversupply could exist for a number of years to come, with rents taking the hit to effectively "buy" demand. On the positive side, this indicates a likely slowdown in student-targeted product along the Hillsborough Street corridor, helping to create opportunities for balancing student-oriented with demand potential from other land uses.

For-Sale Housing Overview

While Raleigh economically weathered the last recession better than most other metro areas, it's housing market still felt significant impacts; Central Raleigh included. Like most infill areas, most for-sale housing developed in intown locations comes in the form of two attached products: condominiums and townhouses. Both have seen a significant drop-off in volumes and, largely in price as well.

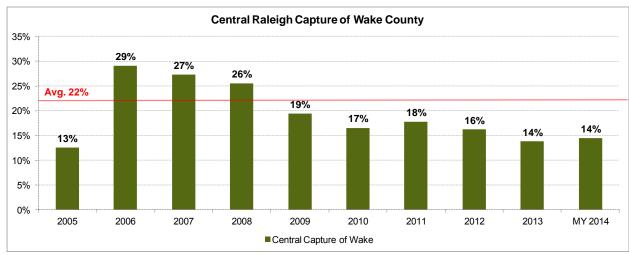
As shown on the graph on the following page, new townhouse sales in Central Raleigh (the area within the BeltLine) have dropped by roughly 75% since the peak of the market in 2006 and 2007, with average new sales now totaling around 150 to 200 annually over the last several years. While volumes have dropped off significantly, prices have held generally firm, declining by around 5% to 8% over the period; respectable given the price drops seen in many markets (note: the 2014 mid-year numbers are small and may be more influenced by a lack of product than actual appreciation).







Prior to the recession, Central Raleigh accounted for roughly 25% to 30% of Wake County townhouse sales. That number has dropped significantly, largely due to a lack of intown supply. Based on this lack of supply, Central Raleigh's capture of townhouse sales within Wake County has dropped to around 14% over the last few years. We believe this capture will increase over time as opportunities for new townhouses intown should remain strong. The main inhibitor, as with most of the country, is challenges in purchasing homes, particularly among younger buyers who are often most interested in townhouses.







Only a few townhome communities are actively selling within the BeltLine and those products are largely lower-density products that may be difficult to support in Cameron Village and particularly within the Hillsborough Street Corridor. These communities are selling for around \$150/SF to \$200/SF and vary in terms of audience, with some pursuing more mature buyers (Grove at Fallon Park) and others seeking younger, active buyers (Ramblewood Townes and Bount Street Commons).

Depending on the location, either product represents an opportunity for the Cameron Village area, albeit more in a neighborhood-adjacent location, where land prices are more suitable for lower-density development. Redevelopment of multifamily, retail, or office properties for such a use are not feasible, as townhouse land prices can only go up to around \$750,000 to \$900,000/acre.

While townhouse development directly on Hillsborough Street is unlikely, development of townhouses on side streets in the corridor is possible and supportable, albeit at a discounted price from that seen in Cameron Village and more in the \$650,000 to \$750,000 per acre range.

The condominium market intown has seen a similar slowdown, albeit with a more significant drop-off, with new sales volume declining by 95% from peaks in Central Raleigh and price drops of somewhere around 25% (difficult to discern given the lack of product available). The condo market has been the hardest hit among the three major for-sale residential product types and will be the slowest to recover. Experiences in more urban markets are that bigger projects—those with more than 150 units—are very difficult to finance and most new projects developed are more in the 25 to 100-unit range, where risks are lower.



One new condominium project is actively-selling in the Cameron Village area—1300 St. Mary's; a converted office building. That project will provide for 39 units, of which 17 are currently reserved (reservations will be converted to contracts within the next 30 to 60 days). Realtors report fairly solid support so far, with the project achieving around 3 reservations per month, largely from intown residents (Cameron Village area, Five Points, Hayes Barton), ranging from their 30s to empty nesters seeking to move down. Prices are generally around the mid to upper \$200s per square foot, a challenging price point for new concrete and steel construction, but achievable for low-rise to midrise product.







As with the other three land uses, NCG created a for-sale attached residential demand model to estimate potential support for new attached townhouses and condominiums in the greater area and in the two study areas. This demand incorporates projected job growth with attached and detached home sales trends in Wake County and Central Raleigh. Based on our estimates, we believe the two study areas could capture around 10% of Central Raleigh demand, with captures being tempered by land supply, particularly for new townhouses.

	New For-Sal	e Housing Dema	and (Units) by T	imeframe	Totals
	2006- 2010	2011 - 2015	2016 -2020	2021 - 2025	2011 - 2025
New Wake County Attached Homes	7,694	8,809	10,593	11,471	30,873
Central Raleigh Area Capture		•	·	•	
Attached Homes (TH & Condo)	31%	19%	25%	31%	26%
Central Raleigh Attached Homes	2,385	1,674	2,648	3,556	7,878
Cameron Village/Hillsborough Street Corri					
Attached Homes	10.0%	10.0%	10.0%	10.0%	10%
Combined Area Attached Home Capture	239	167	265	356	788
Townhouse Demand		92	119	124	336
Condo Demand		75	146	231	452

While 65% of intown attached home sales have been townhouses (35% condos), we believe the lack of land in the area suitable or feasible for townhouse development will result in a greater share of demand being for for-sale condos, with less capacity existing to support for-sale townhouses.

Land Prices

As noted earlier, rental apartment development is one of the few real estate products moving forward in intown Raleigh and many other markets. Retail and office development, while recovering, is just beginning to occur in many markets and thus, the majority of land sales occurring in and around the study area have been for development or redevelopment as rental apartments.

NCG examined a number of potential redevelopment sites in the Cameron Village study area, most of which are existing office sites, and identified both an estimated current value and a potential multi-family density required for redevelopment of these parcels to be feasible (assuming some level of ground floor retail). The following summarizes these sites:

				Current	Est. Value		Target Density	
Property	Current Use	SF	Acres	Lease Rate	per Acre	Potential Use	(DU/SF Acre)	Feasibility
505 Oberlin	Post Office Site	42,184	1.91	\$18.50	\$4,281,783	Multi-Family	135	No
615 Oberlin	Office	18,792	0.67	\$17.50	\$5,143,690	Multi-Family	125+	No
617 Oberlin	Office	2,979	0.34	\$17.50	\$1,606,824	Multi-Family	60	Yes
1111 Oberlin	Office	7,274	0.45	\$18.50	\$3,133,799	Multi-Family	100	No
1101 Oberlin	Office	9,394	0.69	\$18.50	\$2,639,440	Multi-Family	100	Borderline
Rite-Aid/Chick-fil-A	Retail	33026	2.74	\$26.60	\$4,439,476	Multi-Family/Retail	125+	Unlikely





In general, the following summarizes the land prices each potential land use can support, with Hillsborough largely representing the lower end of the ranges and Cameron Village running the full range:

- For-Sale Townhouses: \$750k \$900k/acre for 12 15 DU/Ac
- New suburban office: 15,000 SF/acre \$1.3M/acre
- Decked mid-rise Multifamily 75 100/acre \$1.7 \$2.0M/acre
- Retail: Assumed to be first floor land use and not freestanding.

Redevelopment of parcels along Hillsborough Street—most will be for new multifamily housing—is a more difficult issue to discern. Feasibility, and the type and height of construction, varies parcel-by-parcel, depending on:

- > The location of the property (Projects fronting NCSU tend to be the toughest, in part due to the following issues);
- > The size of the property (very small properties being more challenging, particularly with parking);
- The age and performance of the existing land uses (newer retail being tougher to redevelop); and
- The amount of retail on-site relative to the size of the parcel (e.g. higher FARs).

Below are several properties NCG examined to understand potential heights required for feasible redevelopment of existing properties to multifamily (assumed to be rental in this exercise).

As noted above, rental apartment developers can afford to pay around \$1.7M to \$2.0M per acre for midrise product (stick-built) with structured parking. These prices assume densities from 75 – 100 units per acre and rents around \$1.60 or higher. Hillsborough Street, while maintaining an absolute dollar discount to those in Cameron Village, can achieve strong per square foot rents via reducing unit sizes (achievable with college/grad students and younger working singles/couples). Student-oriented buildings may also have significantly reduced parking provisions, allowing densities to go much higher.

This allows for similar land prices as Cameron Village, with a challenge being the land supply, which is largely comprised of very small parcels, most of which are in current use as retail, and many with very limited parking and thus high FARs. These dynamics vary widely and impact the potential values of these properties significantly.

To this NCG ran a number of case study properties, making assumptions for potential existing lease rates for retail and utilizing tax data for parcel size and current square feet. This analysis found that stick-built construction (generally five floors or lower) is feasible on properties with:

- Older retail stock achieving lower lease rates (around \$16/SF \$18/SF or so and below); and
- Properties with low FARs and abundant parking fields.

Property	Existing Retail SF/Acres	Assumed Potential Land Value	Assumed Redevelopment Density	No. of Floors Required for Feasible Redev.
1307 Hillsborough (FMW Site)	0 SF/.55 Acres (0.0 FAR)	\$350,000	75 DU/Acre	4 – 5 Floors
2510 Hillsborough (Joshi Site)	7,500 SF/.19 Acres (.9 FAR)	\$1.19M	225 DU/Acre	7 Floors
1 Dixie Trail (Eat Village Grill)	3,537 SF/.67 Acres (.12 FAR)	\$821,000	90 DU/Acre	4 – 5 Floors
2316 Hillsborough (Jimmy Johns/ Chipotle Site)	11,127SF/.44 Acres (.58 FAR)	\$2.99M	300 DU/Acre	7+ Floors

^{*} Assumes 800 – 850 SF average unit size and rents of around \$1.60 to \$1.70/SF





Smaller properties with older retail and higher current FARs, such as the Joshi site, require somewhat greater intensities to support redevelopment and thus require steel frame construction—more in the lines of 6 to 7 floors. Finally, some properties, such as the small strip with Chipotle and Jimmy John's, are too new and achieving rents that are too solid to support redevelopment for a long, long time.

In short, appropriate development heights and intensities will vary along Hillsborough Street, depending on the sites and the existing uses. Development feasibility can be enhanced via reduced parking, although such scenario tempers market appeal for these projects beyond students, and may further limit non-student interest in parts of the corridor overall.

Over the next five years or so, we expect development pressure in the Hillsborough Street Corridor to focus more on eastern portions of the corridor, particularly around the YMCA/Velvet Cloak area and near the new aLoft Hotel—an area that connects both Cameron Village and Hillsborough Street. This is in part due to the ability to begin connecting the corridor to Downtown Raleigh as well as to the abundance of student housing options already being developed or approved in western portions of the corridor; a market that will become increasingly competitive in the coming years.

To influence growth and redevelopment in central portions of the corridor, those closest to NCSU's campus, the City and the University will likely need to partner to facilitate better town-gown relations and broaden that portion of the corridor's audiences & patronage beyond the student market. Case studies should be conducted looking at other successful efforts that have occurred elsewhere in the US. Potential case studies the City should consider include:

- Rutgers University--New Brunswick, NJ
- U. of Washington--Seattle
- Arizona State Univ--Tempe
- U. of Georgia--Athens
- > Texas Tech Univ.--Lubbock Texas
- Ohio State Univ.--Columbus
- Notre Dame (Eddy Street)--South Bend, IN
- Vanderbilt Univ--Nashville
- > Univ. of Virginia--Charlottesville, VA







PHASE I INPUT SUMMARY

JANUARY 20, 2015

OUTREACH BY THE **N**UMBERS TO **D**ATE:

- 1 Advisory Committee Meeting (Additional Planned in the Winter and the Spring)
- 1 Public Meeting (Additional Planned in the Winter and the Spring)

Public Meeting Participation:

- Approximately 130 Attendees
- 118 Short-Answer Surveys Collected at the Meeting
- Community Image Survey Respondents:
 - 63 135 Respondents for Part 1: Infill Redevelopment
 - 60 92 Respondents for Part 2: Neighborhoods & Transitions
 - 12 84 Respondents for Part 3: Open Space, Streetscape, & Public Identity

ONLINE PARTICIPATION (AS OF 01.06.2015):

- 139 Short-Answer and Community Compass Survey Responses
- 207 Respondents / 192 Total Comments on the Wikimapping Exercise



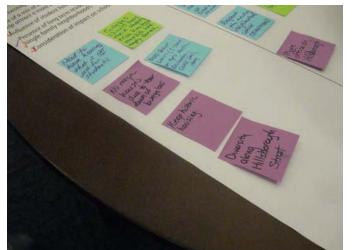






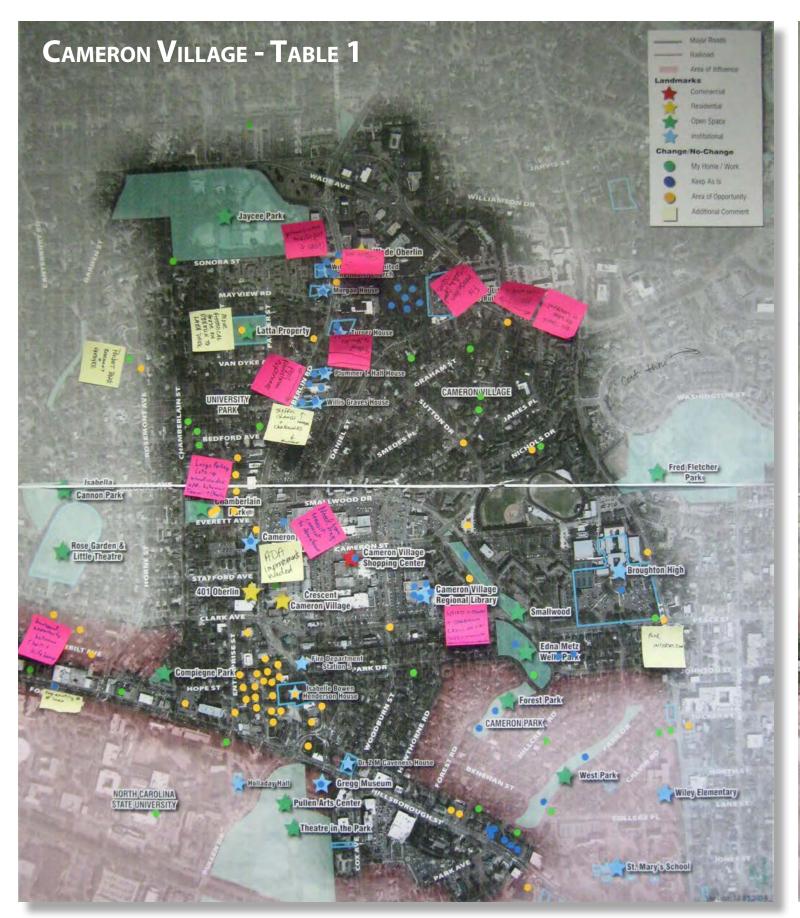




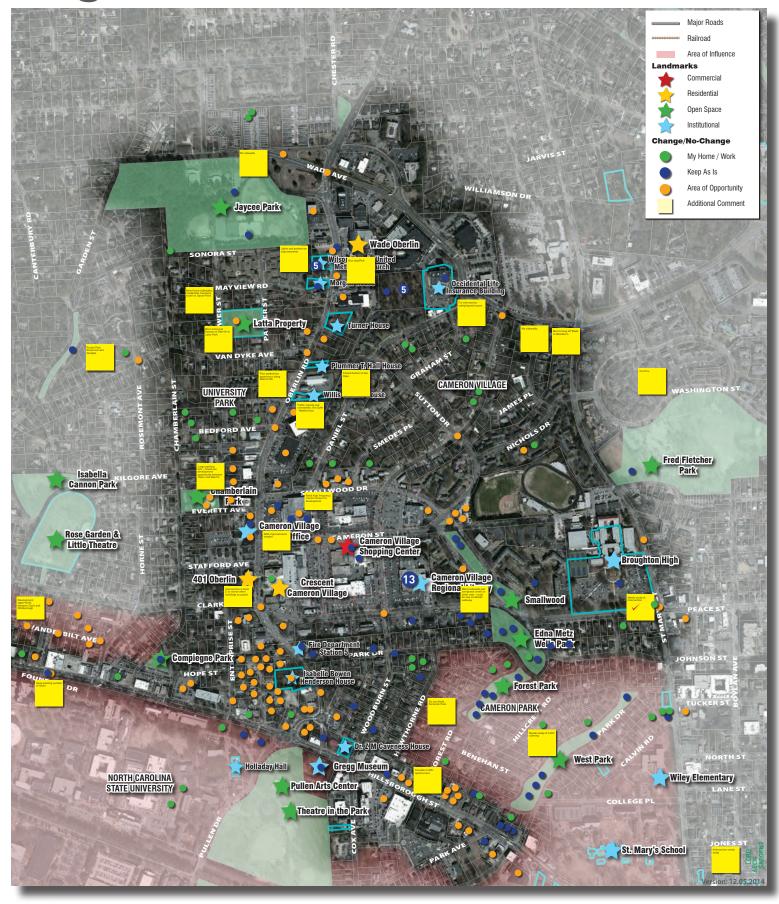






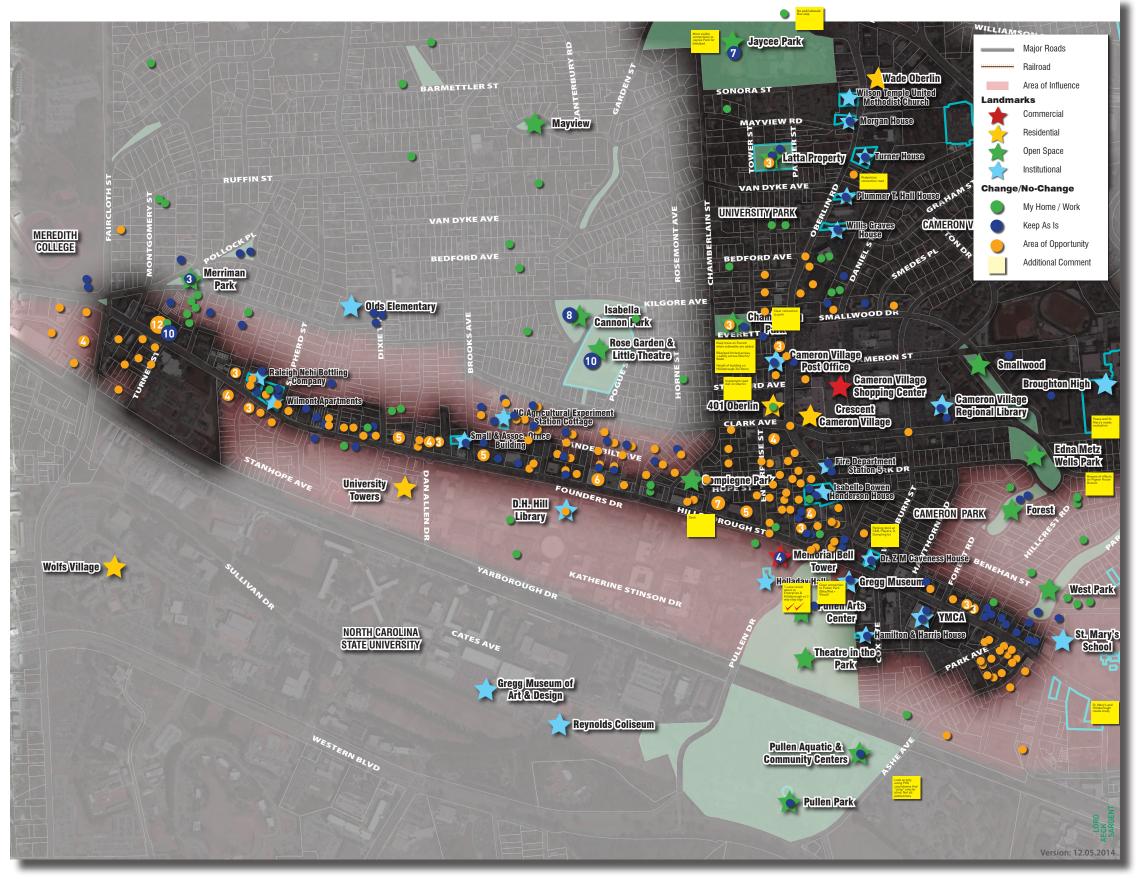






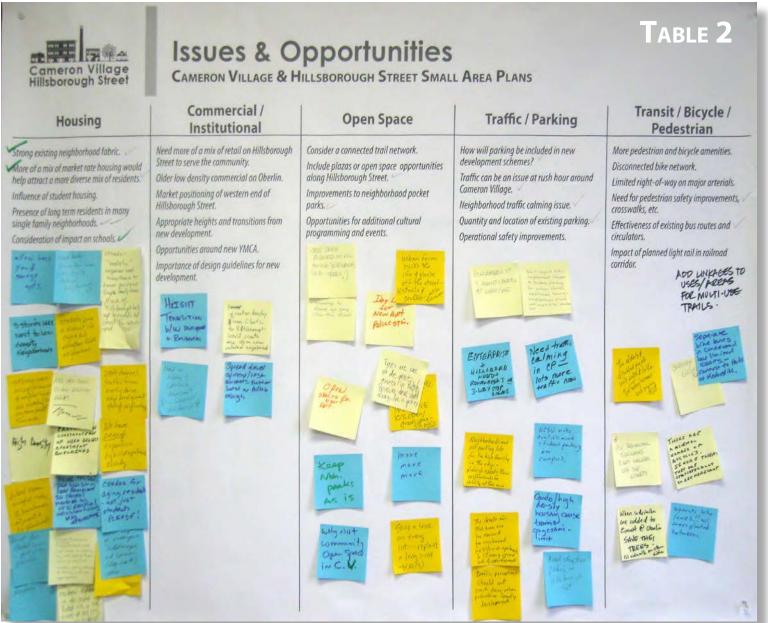






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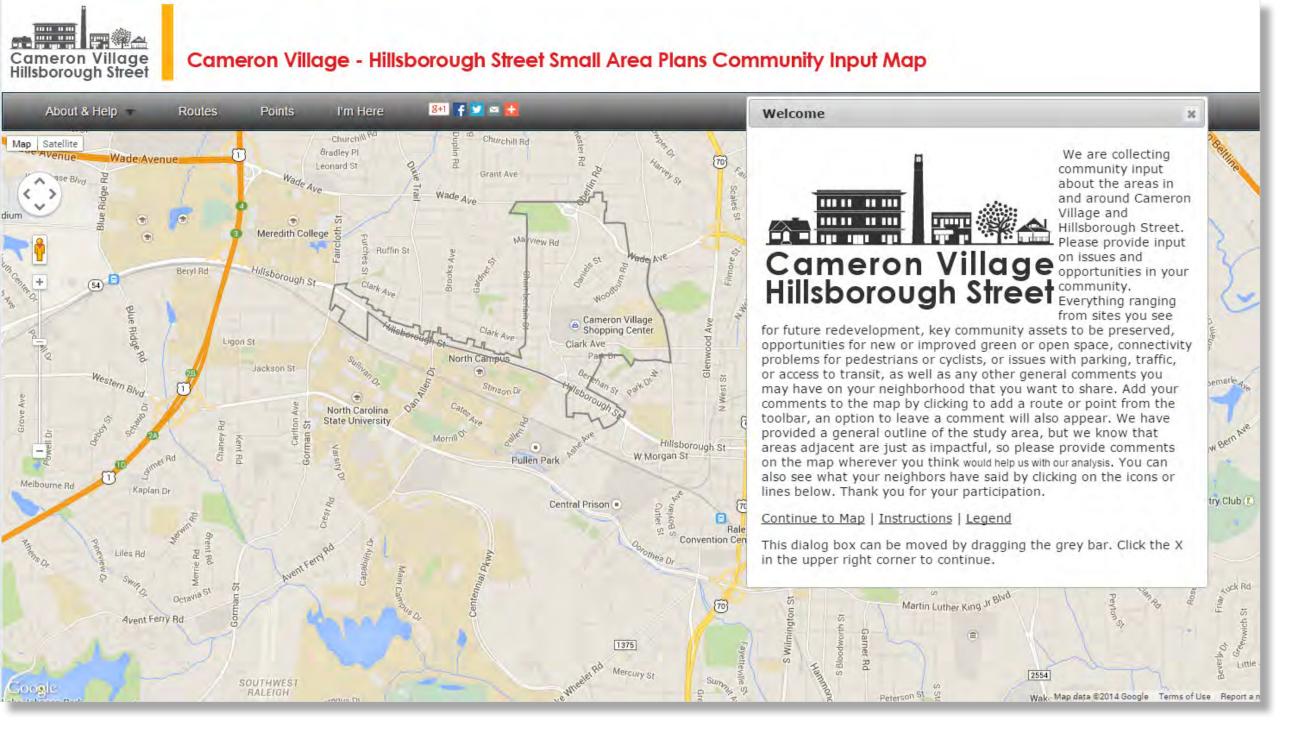




I ssues and Opportunities Exercise

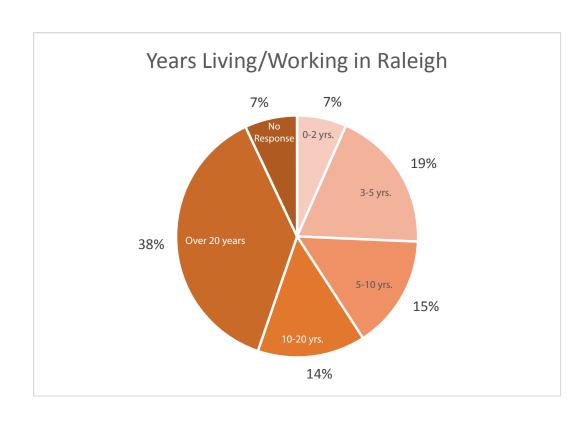
Housing	Commercial / Institutional	Open Space	Traffic / Parking	Transit / Bicycle / Pedestrian
Presence of long term residents in many single family neighborhoods. X9 Strong existing neighborhood fabric. X8 More of a mix of market rate housing would help attract a more diverse mix of residents. X5 Consideration of impact on schools. Influence of student housing. Mad open space to all housing areas.	Appropriate heights and transitions from new development. ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	Improvements to neighborhood pocket parks. ✓ ✓ ✓ ✓ ✓ ✓ Include plazas or open space opportunities along Hillsborough Street. ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	How will parking be included in new development schemes? ✓ ✓ ✓ Traffic can be an issue at rush hour around Cameron Village. ✓ ✓ ✓ Neighborhood traffic calming issue. ✓ ✓ ✓ Quantity and location of existing parking. ✓ ✓ Operational safety improvements. ✓	More pedestrian and bicycle amenities. x5 Disconnected bike network. Need for pedestrian safety improvements, crosswalks, etc. Effectiveness of existing bus routes and circulators. Impact of planned light rail in railroad corridor.
Need owner occupied condos and townhouses adjacent to neighborhoods residuals single family NCSU has land, Meredith	Market positioning of western end of Hillsborough Street. 🗸		should not limit dense urban pedestrian friendly development constrained for high rise apartments to fill every purpose and to redevelopment	Limited right-of-way on major arterials. Make transit easier - more benches and shelters Frequency is freedom get walkers off the streets
Create density that supports transit such as 5-7 story apartments More multi-family housing existing neighborhoods with high owner occupancy by	Limit heights residential buffers Limit height. Not over 3 stories Limit height. Not over 3 neighborhoods uphold transitions	Save some Tree preservation should be a priority because they are required on all housing developments (with trees) Raleigh	NCSU make available more student parking on campus density on the edge - Raleigh needs these neighborhoods for stability of this area	The elderty and disabled people can't walk or bike. Divided bike/car lanes Subway/elevated rail
No additional high rise and affordable lincluding small scale rental goods, etcl housing for tiders, etcl housing for tid	Keep historic buildings on Hillsborough NX Not over 5 stories near [in] NX Obertin Road Obertin Road Obertin Road	NYC limits air space. Nothing higher than the trees Retain neighborhood parks as is More open space	Enterprise and Hillsborough need roundabout or three way stop signs Way stop signs Don't supect older neighborhood streets to become parking for urban streets additional housing - neighborhoods should not subsidize developers Hillsborough Street is adjusted to a street additional housing street is additional housing to the subsidize developers	The baby boomers are aging. For example, Oberlin Road. There are a minimal number Add linkages to uses/areas Not enough to follow
etc; nousing for electry population and students - diversity Condos for aging neighbors - 3 br, etc. No mega houses due to tear down of bungalows Three stories maximum building heights, located next to density neighborhoods.	Add upscale retail on Hillsborough to attract age group other than students Need a Needs and Dipportunity Assessment for a successful Hillsborough would create more of an urban pedestrian neighborhood Creater density from Clarke to Hillsborough would create more of an urban pedestrian neighborhood	All redevelopment should preserve 10% open/green police station Add upscale retail on Hillsborough to attract age group other than students	Condo/high density cause traffic congestion - limit Don't fear traffic. A tack of parking is good. No need for traffic calming in Cameron Park - 4 way stops work well.	of bicycles. Ignore them, they are statistically insignificant.
Limit height of buildings on Hillsborough and Cameron Village area to three stories Need better transition areas like 0X-3 behind neighborhood transitions Homeless	More office on Hillsborough More diverse retail/ professional services on Hillsborough Street More diverse retail/ restaurants further west on Hillsborough	Urban form reduces the life and plants off the street. Should consider appropriateness in area Cameron Village Use open space, grass + plazas to alleviate bigger buildings	Neighborhood traffic calming needed to discourage volume as well as speed	Need sidewalks in Cameron Village residential area Separate bike lanes in connected but limited routes - connect to parks at Meredith Need traffic catming in Cameron Park
Hillsborough St. to owner occupied single family homes. Much of Hillsborough backs up to rentals that could be redeveloped Keep existing residential neighborhoods in the center apartments Allow backyard garage Street Diversity along Hillsborough Street	High transition between development and residential development and residential development developmen	Open space on Hillsborough Connections to 8 pocket parks Dog park in housing developments - open space for residents	No more traffic calming Must study Peace & St. Mary's , Hillsborough & St. Mary's	Traffic island and crosswalks on Oberlin Separate bike lanes with trees planted between street network to improve walkability
neighopromosis in the center of Alaleigh that are an asset to the city. Make sure new development does not endanger them.		Leave neighborhood pocket parks as existing "stay wild" or neighborhood cleaned	Need daytime parking on Hillsborough Street On street parking to slow the cars, help business and pedestrians Traffic rituals should not be the primary consideration for urban design	Connect bike trails Density to support transit When sidewalks are added to Everett at Oberlin, the trees need to be saved. But sidewalk on other side
Condos for both students and aging residents Have NCSU locate housing near Cameron so rental market in residential neighborhoods will be less attractive				More lighting at traffic circle, especially Hillsborough and Morgan

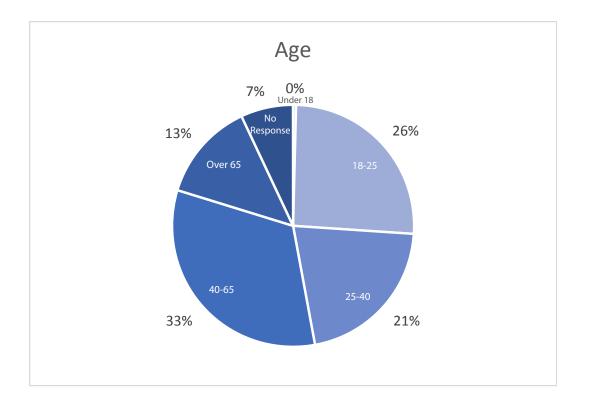
Community Outreach Tools



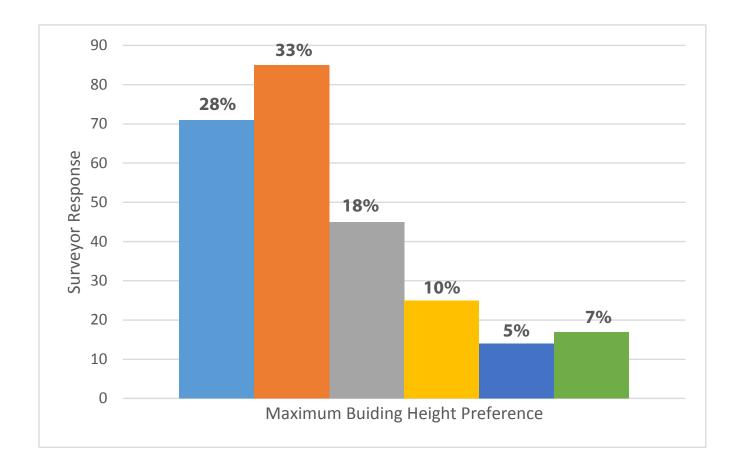
For up to date project information and a link to the online Community Outreach tool please visit:

www.raleighnc.gov
Search keyword
Cameron /
Hillsborough.





1. What do you think should be the maximum height of the buildings along the Hillsborough Street retail corridor?



Legend

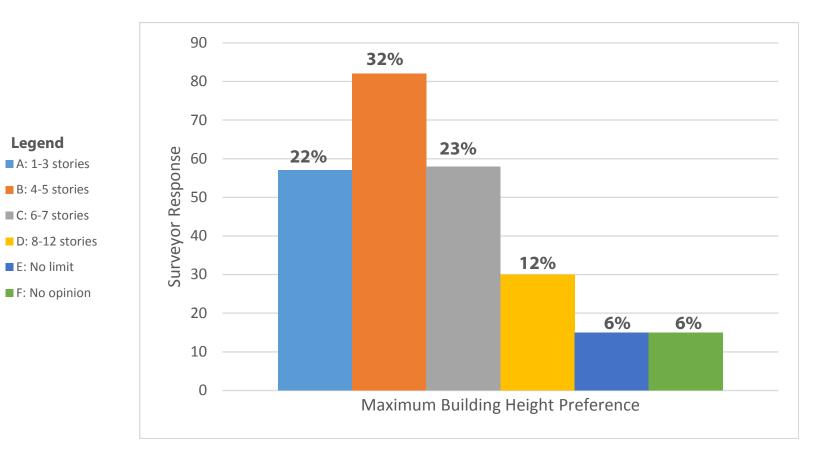
A: 1-3 stories ■ B: 4-5 stories

■ C: 6-7 stories

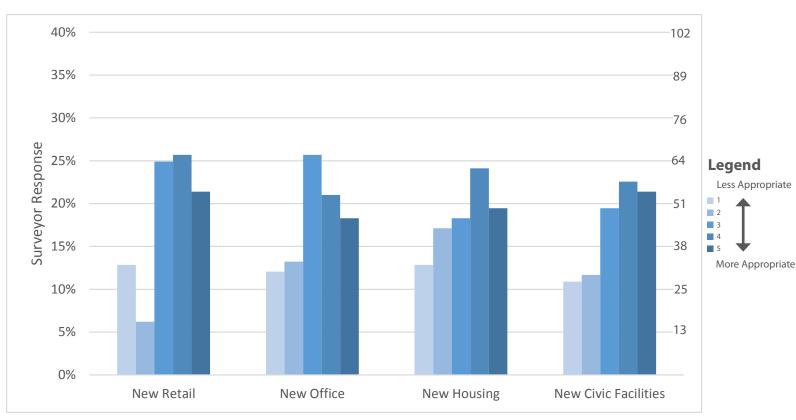
■ E: No limit

F: No opinion

2. What do you think should be the maximum height of the buildings along the **Oberlin Road parallel to the Cameron Village Shopping Center?**



3. What type(s) of new development do you feel is most needed around Cameron Village and along Oberlin Road?



- * 41 Additional comments were provided, including the following:
- Parking, more grocery stores
- Medical services
- Affordable housing family housing non-traditional
- House of worship
- Bring the R-Line to Cameron Village
- Light industrial
- Parking deck
- New sports facilities, basketball courts and soccer fields

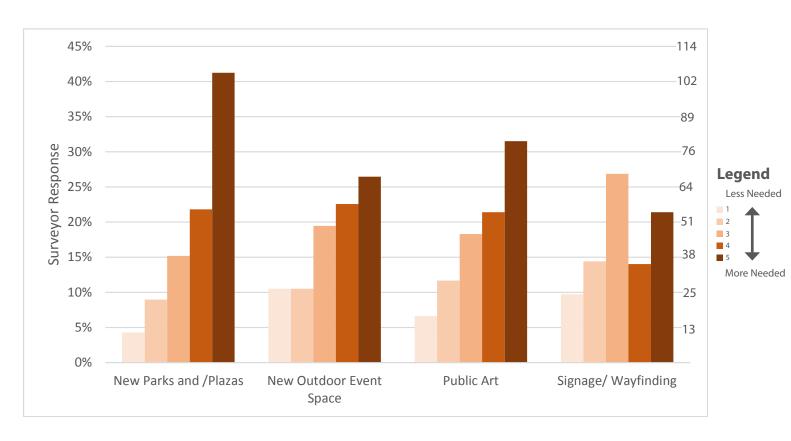
4. What type(s) of new development do you feel is most needed on Hillsborough Street?



- * 38 Additional comments were provided, including the following:
- Grocery store
- Student housing with parking
- Pocket parks; public parking; artist studios; creative businesses
- Dog park
- A hardware store
- Movie theater
- Open areas (green)
- No new development until existing buildings are renovated and in use

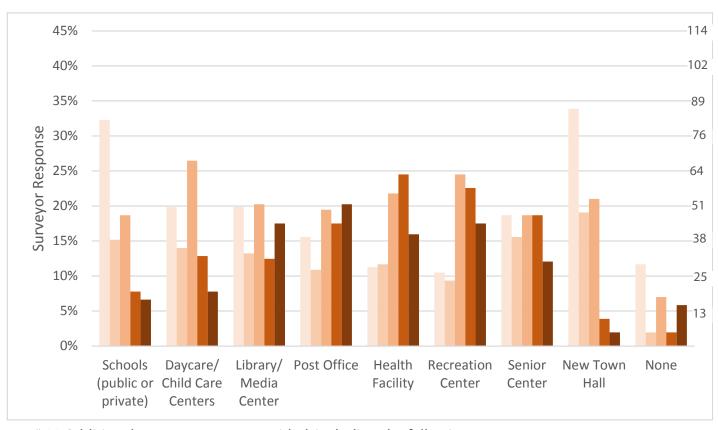


5. What types of new open spaces are most needed in the Cameron Village/Hillsborough Street area?



- * 19 Additional comments were provided, including the following:
- Dog, homeless, parking space parks and other non-traditional parks
- Not the place for large open space
- Connection/complete grid
- Indoor recreation/entertainment historic elements recognized diversity
- Dog park for apartments in this land use design
- Bicycle and walk paths
- A public pool
- A plaza that functions as an outdoor event space

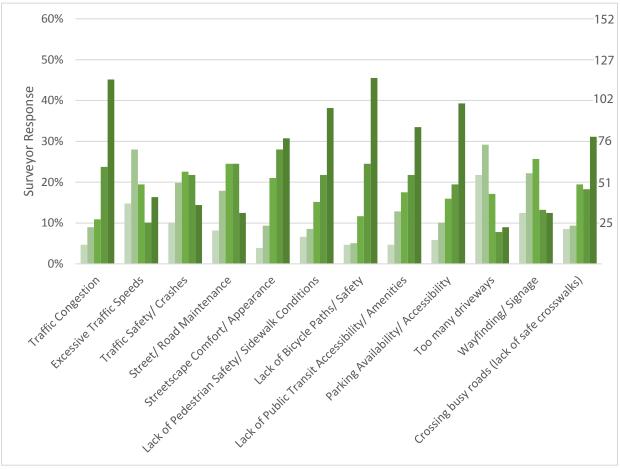
6. What types of institutions, if any, are most needed in the Cameron Village/ Hillsborough Street area?



- * 20 Additional comments were provided, including the following:
- Police station
- Preservation of historic structure
- Cinema, bakery, off brand clothing, bookstore, hardware, affordable housing/transient shelter, historic heritage
- Retail Service: Drug store, gas, etc.
- Skate park
- Local market/Farmers market
- Community Center

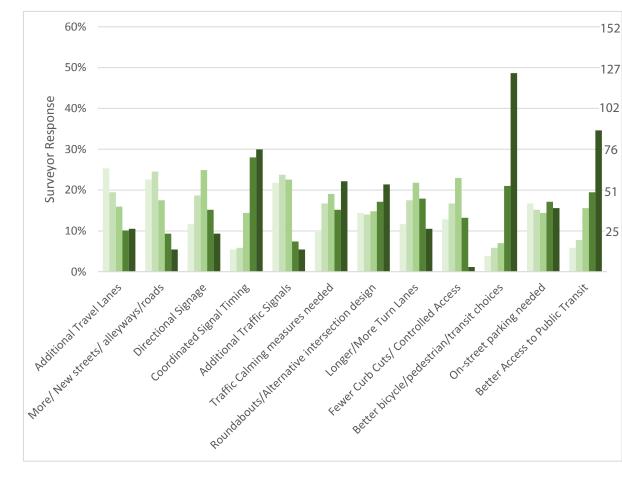


7. What are the most important traffic and transportation issues in and around Cameron Village?



- * 28 Additional comments were provided, including the following:
- Better times/schedules to go downtown on weekends and evenings
- Transient shelters, weather shelters
- Connectivity, streets too wide
- Noise from crosswalks is very loud.
- Too much cutting through residential neighborhoods
- Parking deck/speed humps to slow traffic
- Prioritize this area for bicyclists and pedestrians. 12-15 foot sidewalks and buffered bike lanes

8. What measures are needed to improve traffic in and around Cameron Village?



- * 18 Additional comments were provided, including the following:
- Covered shelters at bus stops.
- Flashing crosswalk signs and more pedestrian access points to cross Oberlin and Peace
- Bicycle routing at intersections, limit left turns
- Parking shuttle
- Parking deck

Legend

Very Important

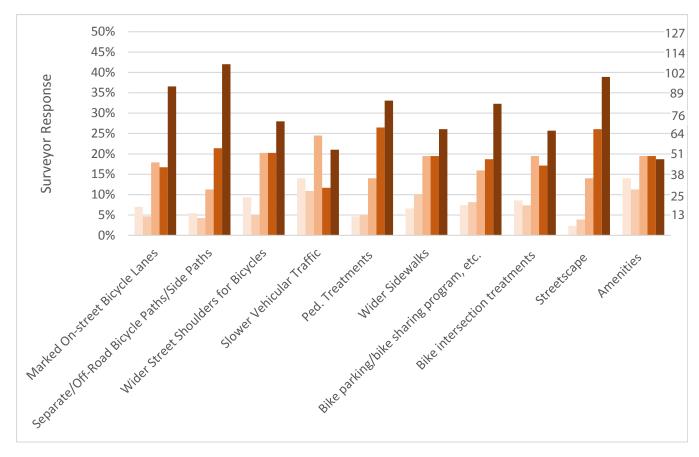
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- More parking at Cameron Village
- Better/larger street trees for traffic calming

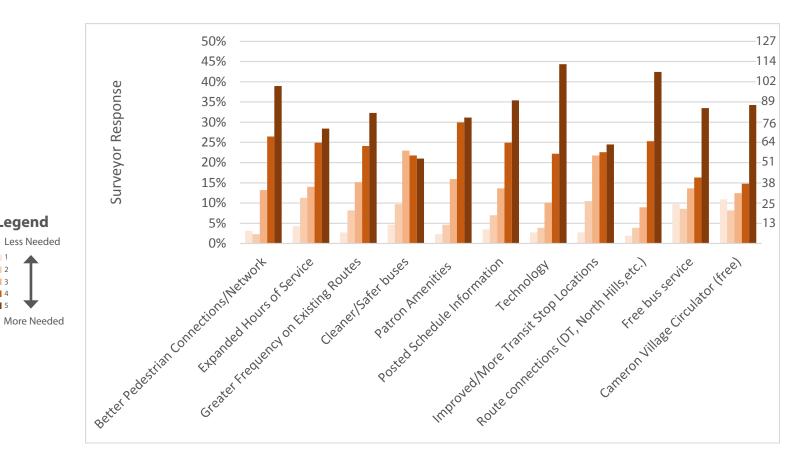


9. What measures are needed to improve the pedestrian/bicycling environment in and around the Cameron Village/Hillsborough Street area?



- * 16 Additional comments were provided, including the following:
- Wayfinding -parking information
- Median with landscaping from Morgan to Oberlin "intermittent"
- More trees so people can walk in the shade in hot weather
- Slower speed for cars
- Speed bumps
- More lighting
- More bike parking

10. What measures are needed to improve transit in and around the Cameron Village/ Hillsborough Street area?



- * 18 Additional comments were provided, including the following:
- Small vehicle services emergency/after hours service
- Rex hospital to Wake Med via NCSU Hillsborough New Bern circulator
- Hillsborough to Cameron to Downtown
- Should be on the basis of need
- Light rail

Legend

2 3 4

- R-Line down to Bell Tower or Brownstone Hotel
- Buses that run on time and stick on a schedule; more bike racks on buses



13. What neighborhood or place do you most identify with in or around the Cameron Village and Hillsborough Street study area?

209 responses, in which the following neighborhoods were the majority:

- 35 Cameron Park
- 33 University Park
- 30 Cameron Village
- 31 NCSU
- 27 Hillsborough St.
- 11 Oberlin road
- The remaining 18 were spread between St. Mary's area, Wade Ave., Dixie Trail, Hayes Barton, Vanderbilt Ave., Woodburn Road, Wilmont, Glenwood South, Maiden Lane, etc.

14. What else would you like to tell us about the Cameron Village/Hillsborough Street area? Have we overlooked a key priority for the area?

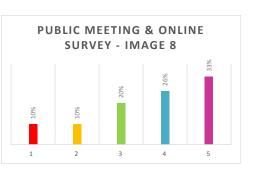
135 responses, which include some of the following comments:

- Maybe ask people whether they mostly drive/walk/bike to work/shop/school. Maybe ask people the cross streets where they live for better demographic data.
- Don't think of Hillsborough St as one consistent corridor. There should be different treatments across from NCSU then Cameron Park, e.g.
- Connector roads, like St. Mary's street and Ash Ave are too busy, too narrow and do not have good parking options. Too many people park on street making it unsafe and narrow.
- Incentives to grow diverse similar amenities in other areas of downtown i.e. spread the attractiveness of "downtown" and Oakwood by supporting groceries, higher end retail, etc. in a "commercial" area like Cameron Village spread the wealth.
- Would like for the design to consider the life cycle of Raleigh families. Right now, Raleigh development caters a lot to young professionals these people will need entertainment and services once they have children! And beyond.
- Programming for public areas, better local information/ communications outdoor "places".
- Housing built for all demographics not just students. How about housing for elderly. Then we could walk everywhere as we age.
- Build townhouses on the parking lots, put reduced parking underground or on periphery. Make it seemlessly easy to walk, bike or take transit. Do not make easier or more attractive to cars.
- We need family housing to attract more students to schools in the area (Wiley, Daniels, Broughton, Olds) NC State has plenty of land and should build dormitories on its property.
- EV charging- great location for it to serve customers and attract them to business.

IMAGES GARNERING POSITIVE CONSENSUS



Image 8 - Infill Development





PUBLIC MEETING & ONLINE

Image 18 - Infill Development



Image 19 - Infill Development

IMAGES GARNERING NEGATIVE CONSENSUS



PUBLIC MEETING & ONLINE SURVEY - IMAGE 5

PUBLIC MEETING & ONLINE

Image 5 - Infill Development





Image 14 - Infill Development

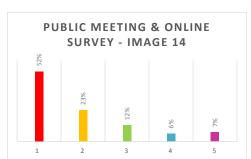




Image 3 - Infill Development

IMAGES SHOWING DISCREPANCY



Image 1 - Infill Development

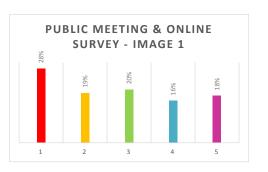




Image 13 - Infill Development

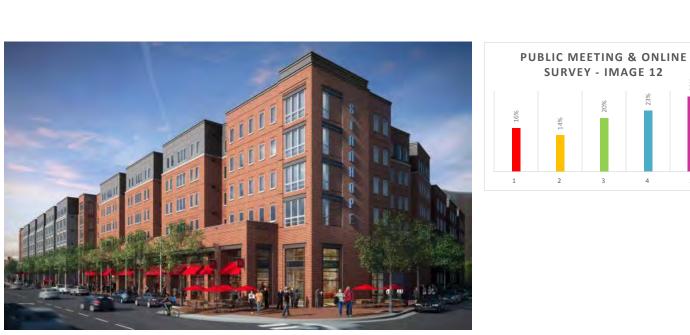


Image 12 - Infill Development

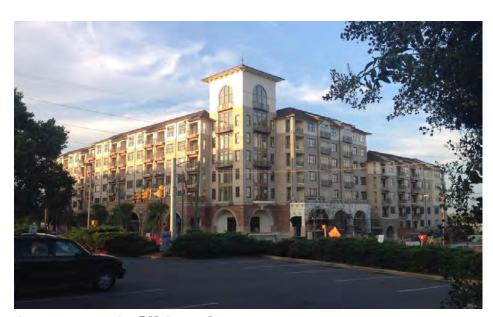
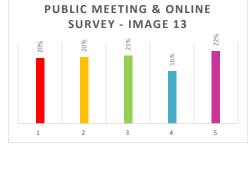


Image 15 - Infill Development



PUBLIC MEETING & ONLINE SURVEY - IMAGE 15

IMAGES GARNERING POSITIVE CONSENSUS



Image 25 - Neighborhoods & Transitions

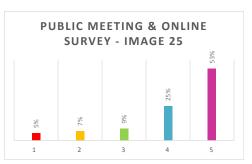




Image 28 - Neighborhoods & Transitions



Image 33 - Neighborhoods & Transitions

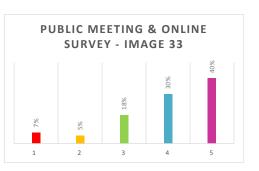
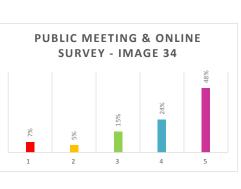




Image 34 - Neighborhoods & Transitions



PUBLIC MEETING & ONLINE

IMAGES GARNERING NEGATIVE CONSENSUS



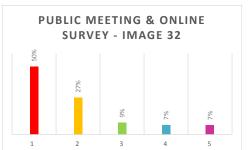


Image 32 - Neighborhoods & Transitions

IMAGES SHOWING DISCREPANCY



Image 27 - Neighborhoods & Transitions

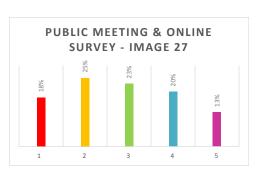




Image 29 - Neighborhoods & Transitions



Image 30 - Neighborhoods & Transitions

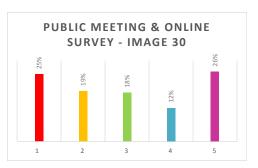
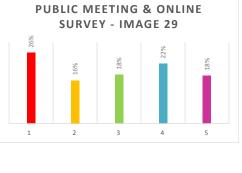




Image 31 - Neighborhoods & Transitions

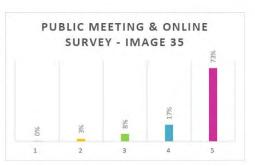


PUBLIC MEETING & ONLINE

IMAGES GARNERING POSITIVE CONSENSUS



Image 35 - Open Space, Streetscape & Public Identity





PUBLIC MEETING & ONLINE

PUBLIC MEETING & ONLINE

Image 40 - Open Space, Streetscape & Public Identity



Image 44 - Open Space, Streetscape & Public Identity

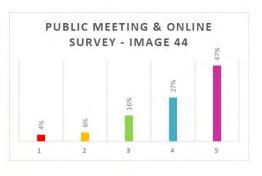




Image 54 - Open Space, Streetscape & Public Identity



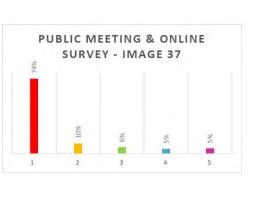
IMAGES GARNERING NEGATIVE CONSENSUS



Image 37 - Open Space, Streetscape & Public Identity



Image 53 - Open Space, Streetscape & Public Identity



PUBLIC MEETING & ONLINE

SURVEY - IMAGE 53



*ONLINE SURVEY - IMAGE 76

Image 76 - Open Space, Streetscape & Public Identity

PUBLIC MEETING & ONLINE



Image 59 - Open Space, Streetscape & Public Identity



IMAGES SHOWING DISCREPANCY



Image 49 - Open Space, Streetscape & Public Identity

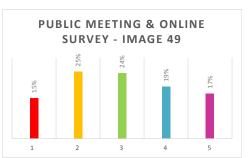
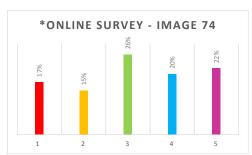




Image 72 - Open Space, Streetscape & Public Identity



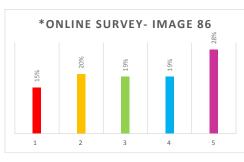
Image 74 - Open Space, Streetscape & Public Identity



* SURVEY COLLECTED ONLINE ONLY



Image 86 - Open Space, Streetscape & Public Identity



* SURVEY COLLECTED ONLINE ONLY